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Management Finance Plan
Information Package

Alberta

EDUCATION
June 1984

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DISCUSSION PAPER ONLY

MANAGEMENT AND FINANCE PLAN

INFORMATION PACKAGE

1984 05 31

NOTICE TO READER

It is important to note that a number of items outlined in this package are still under development. For example, the draft Grant Application Form and School Jurisdiction Annual Report contained in this package will be field tested with eight school jurisdictions. An essential component of the communication process is to obtain feedback from members of the educational community in order that the mechanisms being developed may be adjusted to better meet our mutual needs.

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I. INTRODUCTION: MANAGEMENT AND FINANCE PLAN INFORMATION PACKAGE

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PURPOSE

The purpose of this package is to briefly summarize and explain the key aspects of the Management and Finance Plan (M.F.P). The following areas are discussed.

1. Overview

An overview of the Management and Finance Plan which provides:

- the background to the plan
- the what and why of the plan
- the means used to accomplish the plan
- the implementation timetable for the plan
- a chart outlining the management of education process
- the change in the degree of emphasis placed on key management tools
- a chart presenting the change in roles expected by Alberta Education due to the implementation of the plan.

2. Management Process

The management process resulting from the M.F.P. can be divided into the following three major phases.

Phase One

The first phase is the planning and development phase, which includes the:

- provincial policies, guidelines and procedures
- school jurisdiction policies, guidelines and procedures
- provincial budget
- school jurisdiction budget
- school jurisdiction's Education Plan

Phase Two

The second phase is the delivery and monitoring phase, which includes the:

- o submission of the Grant Application Form
- o delivery of educational programming to students
- o continuous monitoring

Phase Three

The final phase is the management of results phase which includes the:

- o continuous evaluation of the programs being delivered
- o Audited Financial Statement
- o School Jurisdiction Annual Report
- o adjustments which may occur throughout the entire management process.

3. Appendix

An appendix which contains the Definitions of Selected Terms developed for the Management and Finance Plan has been included to assist the reader when working with the information package.

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MANAGEMENT AND FINANCE PLAN
OVERVIEW

BACKGROUND

Commencing in January, 1984, Alberta Education initiated the Management and Finance Plan. The purposes of this broad undertaking were to improve the quality of education provided to students and to respond to current and anticipated changes in society. In order to achieve these ends, a decision was made to substantially modify the Department's approach to the management and delivery of education. While several new changes were considered, the direction adopted was also related to several activities already initiated by Alberta Education in cooperation with school jurisdictions. Examples are: (1) the proposed evaluation of students, teachers, schools, school systems and programs; (2) the Committee on Grants Simplification and Deregulation; (3) the Task Force on School Finance; and (4) the reorganization of Alberta Education, which would include placing more authority and responsibility closer to the focus of delivery.

THE WHAT AND THE WHY

As a part of the Management and Finance Plan, a number of concurrent changes to Alberta's educational system were proposed for implementation over the next three years. Since the provision of quality education results from a complete set of interdependent and constantly changing factors, the project developed a mult-faceted approach. The key components of this strategy were:

- Improved information on the results of educational programming available to students, parents, teachers, school jurisdictions and other educational agencies.

- Increased responsiveness by the total educational system to the changing needs of students and parents.

- Within policy directions established by the Province, increased local responsibility, autonomy, flexibility and discretion by school jurisdictions over the use of provincial funds to meet local needs.

- Increased accountability of both Alberta Education and school jurisdictions to the electorate.

- Increased efficiency and effectiveness in the use of limited public funds for the provision of education with the focus on providing benefits directly to students.

- Enhanced partnership among school organizations and Alberta Education in the planning and evaluation of educational results.

To achieve these goals, a number of means were developed and are being utilized in a planned and organized manner. The means being implemented include:

- developing an improved management capacity for the delivery of public education in Alberta

- simplification of administrative procedures
- reduction in size and complexity of Alberta Education, while enhancing the role of the Regional Offices of Education (ROE)
- greater participation in joint provincial/local activities
- more avenues for public feedback to and quick responses from Alberta Education
- development and management of provincial and local program and evaluation policies
- existence and management of Local Education Plans
- simplified and improved Provincial Budget Mechanisms
- development and use of School Jurisdiction Annual Reports
- conducting and acting on the results of evaluations and other studies.

Through the collective impact of these changes it is intended that:

- the many interests in education will have easier access to improved information about educational policies and the results achieved; and
- the information will be used more effectively and continually to improve the quality of education.

IMPLEMENTATION TIMETABLE

The introduction of the Program Policy Manual and the Management and Finance Plan Information Package begins the implementation of the Management and Finance Plan.

The implementation process will continue over the next three years. On-going monitoring and continued discussions with school jurisdictions in regard to the Management and Finance Plan are key elements of this process. While there are numerous future steps to be undertaken, a selected few are highlighted below:

- April, 1984: Alberta Education Program Policy Manual is tabled.
- October 15, 1984: The modified Grant Application Form is submitted to Alberta Education from school jurisdictions.
- January 1985: Local Evaluation Policies are developed by school jurisdictions
- July 31, 1985: The first School Jurisdiction Annual Report is submitted.
- September 1985: Program Policies for the Special Needs, School Capital, B.Q.R.P., and Transportation are developed by school jurisdictions

- o September 1985: The first School Jurisdiction Education Plan is developed and kept on file.
- o September 1986-87: ECS-12 Basic programs will be included as appropriate
- o Ongoing: Constant monitoring, consultation with school jurisdictions and adjustments to the management process will occur as required.

For the 1985/86 Provincial budget year, Alberta Education will have tabled, discussed and developed additional aspects of the Management and Finance Plan for implementation. Examples of such areas are: further policy development in provincial programming, and additional administrative simplification which will contribute to improving the quality of education provided to students.

It is important to note that parts of the management process which are to be in place over the next three years will be field tested with selected school jurisdictions before implementation.

THE MANAGEMENT PROCESS

The following chart outlines the management process resulting from the implementation of the Management and Finance Plan. Following the process chart is a timeline which outlines when the activities involved in the process occur.

THE MANAGEMENT OF EDUCATION-PROCESS CHART

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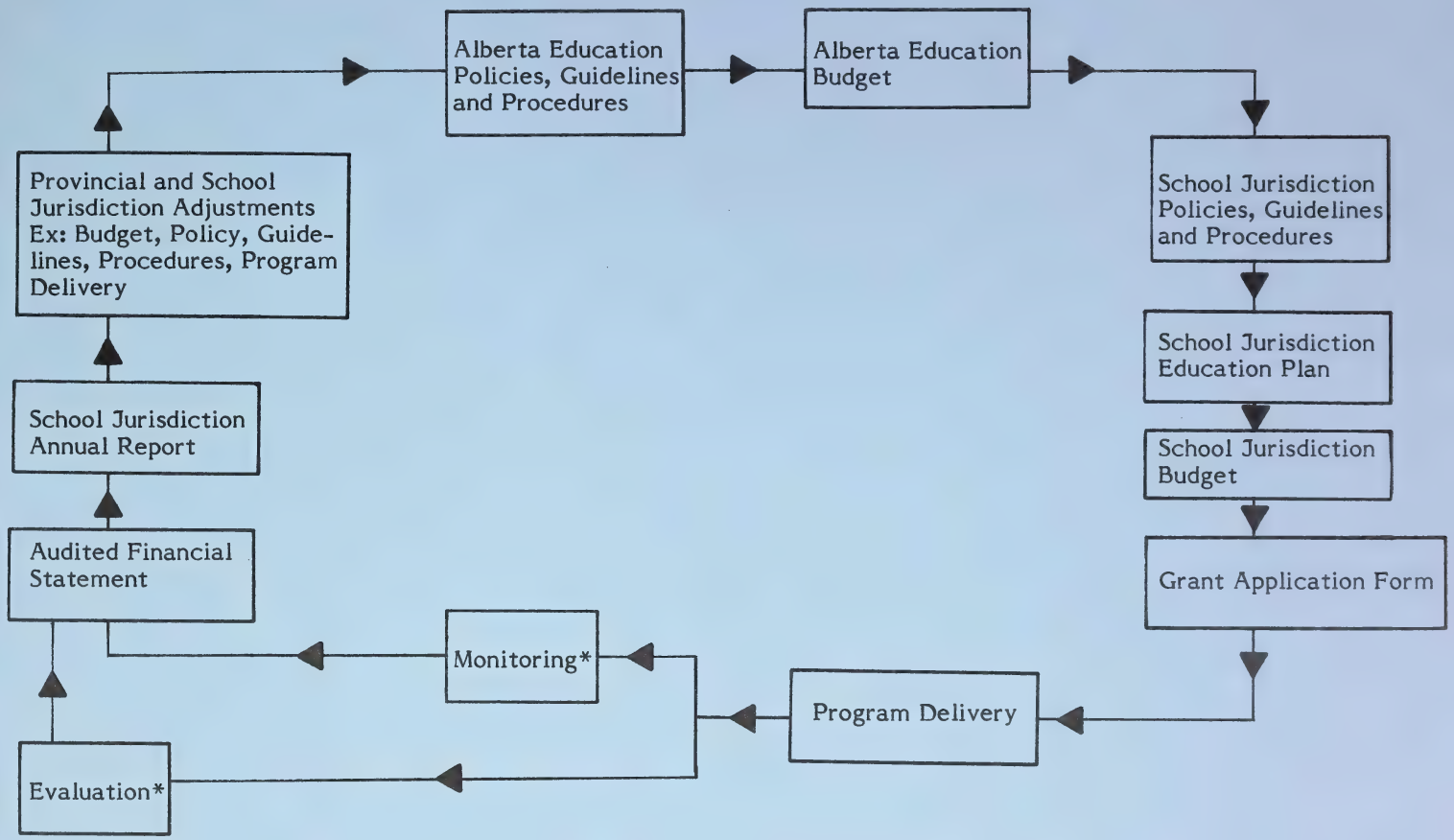
THE MANAGEMENT OF EDUCATION PROCESS CHART


Alberta Education Policies, Guidelines and Procedures
Alberta Education Budget
School Jurisdiction Policies, Guidelines and Procedures
School Jurisdiction Education Plan
School Jurisdiction Budget
Grant Application Form
Program Delivery
Monitoring*
Evaluation*
Audited Financial Statement
School Jurisdiction Annual Report
Provincial and School Jurisdiction Adjustments Ex: Budget, Policy, Guidelines, Procedures, Program Delivery

* Continuous Monitoring and Evaluation Throughout the Process

The Management Process results in the following shift of emphasis:

Degree of Emphasis Placed on Key Management Tools

Management Tools	Degree of Emphasis	
	Present	Proposed
Policies	Low	High
Guidelines	Low	High
Regulations	High	Low
Procedures	High	Medium
Forms	High	Low
Education Plan of School Jurisdictions	Low	High
Audit	Low	Medium
Monitoring	Low	High
Evaluation	Low	High
Annual Reports of School Jurisdictions	Low	High

MANAGEMENT PROCESS TIMELINES

The following timelines indicate when the various aspects of the management process take place throughout the calendar year. As mentioned earlier in the information package the plan will be implemented in phases over the next three years from September 1984 through to the 1987-88 school year. Listed below are the activities to be undertaken on a yearly basis.

ANNUAL MANAGEMENT SCHEDULE

January:	Alberta Education will provide information on provincial funding levels for the upcoming year.
September:	School jurisdiction policies, guidelines, and procedures will be developed and in place before the beginning of the school year. As well all policies, guidelines and procedures will be reviewed on an ongoing basis.
September:	The School Jurisdiction Education Plan is developed before the onset of the school year and kept on file at the local level.
September 30:	The school jurisdiction's final pupil count is taken as at September 30 and serves as the basis for the funding of programs.
October 15:	The Grant Application Form is submitted to the appropriate Regional Office of Alberta Education.
September-June:	Program monitoring will be undertaken on a continuous basis by the local school jurisdictions and Alberta Education.
February 28:	An audited financial statement (A.F.S.) is submitted to the School Business Administration Branch, Alberta Education.
July 31:	The School Jurisdiction Annual Report (2 copies) is submitted to the appropriate Regional Offices of Education.
September-June:	Local jurisdictions will evaluate and make adjustments to their programs as required.
	Alberta Education conducts evaluations and recommends adjustments as required.
June-June:	Local jurisdictions will recommend and implement adjustments as a result of the school jurisdiction annual report or other pertinent activities.
	Alberta Education will recommend, implement or ensure implementation of adjustments as a result of the school jurisdiction annual report or other pertintent activities.

MANAGEMENT AND FINANCE PLAN

IMPLEMENTATION TIMELINE

The key implementation dates for the M.F.P. are outlined below:

April 1, 1984	Alberta Education Program Policy Manual Tabled
October 15, 1984	The modified Grant Application Form is submitted to Alberta Education.
January 1985	Local evaluation policies are developed and kept on file at the local level.
July 31, 1985	The first School Jurisdiction Annual Report is submitted.
September 1985	Program policies for the Special Needs, School Capital, B.Q.R.P. and Transporation Programs are developed and in place at the local level.
September 1985	The first School Jurisdiction Education Plan is developed and kept on file.
September 1986-87	ECS-12 Basic programs will be included as appropriate.
Ongoing	Constant monitoring, consultation with school jurisdictions and adjustments to the management process will occur as required.

ROLES AND RESPONSIBILITIES OF ALBERTA EDUCATION

INTRODUCTION

With the implementation of the Management and Finance Plan came the need to redefine the roles of Alberta Education to suit the requirements of the new management process and to facilitate implementation in the field.

The chart on the following page indicates the primary and secondary areas of responsibility for both the Provincial Office of Alberta Education and its Regional Offices of Education. For example, in number one on the chart, the primary responsibility for the development and adjustment of provincial policies lies with the provincial office while the regional offices play a secondary role by providing assistance where necessary.

As well the complementary role of the local jurisdiction in regard to the management process is included to provide a general overview of the tasks that may be required at the local level.

ROLES AND RESPONSIBILITIES CHART

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ROLES AND RESPONSIBILITIES CHART

DIVISION OF RESPONSIBILITIES WITHIN ALBERTA EDUCATION				ROLE OF SCHOOL JURISDICTIONS IN REGARD TO M.F.P.
Activity	Primary Responsibility	Secondary Responsibility	Timeline	Activity
1. Provincial policies, guidelines and procedures are developed or adjusted as required.	Provincial Office Education (POE)	Regional Office Education (ROE)	As required.	Alberta Education policies, guidelines and procedures are received and reviewed at the local level. Feedback is provided as necessary.
2. Program information is developed and adjusted as required. NOTE: Includes mandatory and advisory information required for the M.F.P. project.	POE	ROE	Usually before program year commencement. (NOTE: program year refers to the period September 1 to June 30)	Program information is used or adapted for local program delivery.
3. Program information distributed and discussed.	ROE	POE	Usually before program year commencement.	Program information is reviewed and discussed between local and ROE staff.
4. Assistance is provided in the development and/or modification of local School Jurisdiction Plans. School jurisdiction Education Plan include: policies, guidelines, procedures, expected results, and how achievement of results will be determined at the end of the program year.	ROE	POE	Completed before the claim form can be presented.	Develop and maintain the educational plan for review as required.

	DIVISION OF RESPONSIBILITIES WITHIN ALBERTA EDUCATION				ROLE OF SCHOOL JURISDICTIONS IN REGARD TO M.F.P.
	Activity	**Primary Responsibility**	**Secondary Responsibility**	**Timeline**	**Activity**
5.	May assist school jurisdictions to establish evaluation plans and priorities.	ROE	POE	Ongoing - Finalized by Sept. 1.	Establish evaluation priorities.
6.	Develops Annual Budget.	POE	ROE	June - December.	N/A.
7.	Annual grants announcement.	POE	ROE	January.	Continue budget preparation at the local level.
8.	Review, and approve school jurisdiction claim form.	ROE	POE	October	Local jurisdictions will submit their claim forms, by October 15 and subsequently adjust as required.
9.	Funds are distributed to local school jurisdictions.	POE	ROE	Ongoing.	Allocation of local funds.
10.	Monitors the delivery of local school programs.	ROE	POE	On-going.	School jurisdiction designate the local responsibility for monitoring the delivery of school programs and ensure that monitoring is carried out.

DIVISION OF RESPONSIBILITIES WITHIN ALBERTA EDUCATION				ROLE OF SCHOOL JURISDICTIONS IN REGARD TO M.F.P.
Activity	Primary Responsibility	Secondary Responsibility	Timeline	Activity
11. Conducts evaluations and and investigations as required.	ROE	POE	On-going as required.	Local jurisdictions may request and/or participate in provincial evalutions.
12. Ensures school jurisdiction conduct required evaluations as planned.	ROE	POE	On-going - before the submission of the School Jurisdiction Annual Report.	Conduct evaluations as required.
13. Review the school organization annual report. Recommend adjustments to subsequent activities.	ROE	POE	Review by August 31. August 31.	Submission of the School Jurisdiction Annual Report by July 15 to ROE.
14. Review school jurisdiction annual reports from a provincial prospective.	POE	ROE	August 31.	N/A.
15. Makes decisions in regard to adjustments to subsequent year's activities of the school jurisdiction.	POE	ROE	August 31.	N/A.
16. Adjustments implemented.	ROE/POE		September - onward.	Adjustments implemented.

DIVISION OF RESPONSIBILITIES WITHIN ALBERTA EDUCATION				ROLE OF SCHOOL JURISDICTIONS IN REGARD TO M.F.P.
Activity	Primary Responsibility	Secondary Responsibility	Timeline	Activity
17. Ensures financial audit is conducted by school jurisdiction.	POE	ROE	February 28.	Annual audited financial statement is conducted.
18. Analysis of information and ensures appropriate financial adjustments are made.	POE	ROE	Upon receipt of audited financial statement.	Makes required adjustments.
19. Required modification to Alberta Education policies, guidelines, and procedures are recommended.	ROE	POE	As required.	- Recommendations submitted to ROE. - Recommendations gathered/utilized at the local level.
20. Provincial policies, guidelines and procedures are developed or adjusted as required.	Provincial Office Education (POE)	Regional Office Education (ROE)	As required.	Alberta Education policies, guidelines and procedures are received and reviewed at the local level. Feedback is provided as necessary.

Definitions: (a) Primary Responsibility refers to the responsibility to plan, initiate and implement a particular activity.

(b) Secondary Responsibility refers to the responsibility to act in a supportive or backup role to assist the primary responsibility to carry out is duties.

PHASE ONE: PLANNING AND DEVELOPMENT

- INTRODUCTION

- POLICY DEVELOPMENT AND MANAGEMENT
  Definitions
  Characteristics of a Policy Statement
  Characteristics of a Guideline
  Characteristics of Procedures
  Early Childhood Services Policy, Guidelines and Procedures

- FUNDING INFORMATION
  Introduction
  Information Addendum to 1984 School Grants Schedule of January 12, 1984
  Finance Terms

- SCHOOL JURISDICTION EDUCATION PLAN

INTRODUCTION: PLANNING AND DEVELOPMENT

The management process being implemented through the Management and Finance Plan includes three separate but interconnected phases, the first of which is the Planning and Development phase. In order to implement the Planning and Development phase the following management tools have been utilized.

- Provincial and local policies, guidelines and procedures which facilitate the implementation of a policy oriented rather than a regulations oriented management process.

- Provincial and local budgets which outline the upcoming year's financial plan. This process will continue as previously practised and therefore a discussion and example of a budget has not been included. However, we have included information on the addendum to the 1984 School Grants Schedule of January 12, 1984.

- The School Jurisdiction Education Plan which is kept on file at the local level and outlines the jurisdiction's goals, policies, guidelines and procedures, program offerings and what results the jurisdiction intends to achieve in the upcoming school year.

POLICY DEVELOPMENT AND MANAGEMENT

INTRODUCTION

The introduction of a policy oriented rather than a regulations oriented management system is based on several premises. One premise is that decision making should be flexible and adaptable at the local level. This greater flexibility is intended to provide local responsibility, autonomy and discretion yet it is balanced by requiring local accountability through the use of reporting mechanisms like the School Jurisdiction Annual Report.

The following section assists in developing a further understanding of a policy oriented management system by:

- defining and outlining the characteristics of good policies, guidelines and procedures.

- providing examples of each from the Department's Program Policy Manual. A sample of a policy, guideline and procedure is included as well as the completed policy statement for the Early Childhood Services Program. The entire manual is available as an additional document but it is not included in the information package.

DEFINITIONS

POLICY: A policy is a philosophically based statement which is goal oriented and establishes the direction for future discretionary action.

GUIDELINE: A guideline further defines the framework within which the organization can discharge the policy with positive direction. It tells what is wanted. It may also indicate why and how.

PROCEDURE: A procedure is a statement of who does what, how, and in what sequence. Procedures may be either mandatory or discretionary.

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CHARACTERISTICS OF A POLICY STATEMENT

A good policy:

1. Is philosophically based and arises from accepted organization goals.

2. Is a brief, general statement of an organization's beliefs on a certain matter.

3. Tells what is wanted of the organization (or other related units or individuals).

4. Tells why certain things are wanted of the organization (or other related organizations or individuals).

5. Constitutes a clear basis for the development and implementation of guidelines, procedures and regulations.

6. Provides positive direction to the management and staff, but does not, and should not, prescribe methods for arriving at an end result.

7. Permits the managers and staff to make interpretations in such a way as to adjust for changing conditions without making any basic changes in policy.

8. Provides the initial basis for evaluating the performance of the organization.

EXAMPLE

For the purpose of enhancing individual abilities and future educational opportunities, Alberta Education supports the provision of integrated services through parents, staff and community, which address the developmental needs of each child below the age of school entrance. (E.C.S. Policy Statement)

CHARACTERISTICS OF GUIDELINES

A set of good guidelines:

1. Provides further clarification of key words used in the policy statement.

2. Indicates what is wanted, such as the provision of a particular program and whether there are mandatory or advisory priorities.

3. May further explain why a particular policy is required.

4. Indicates how the policy will be administered. This would include such topics as responsibility centres, funding mechanisms, the provision of mandatory or advisory information, etc.

5. Is brief and can easily be read and understood by individuals inside and outside the initiating organization.

EXAMPLE

Alberta Education supports the delivery of early childhood programs through public and private operators.
(E.C.S. Guideline)

CHARACTERISTICS OF PROCEDURES

A set of good procedures:

1. Specifies the list of activities required to implement the policy and guidelines.

2. Identifies the organizational unit responsible for the activity.

3. Outlines the sequence of activities required to initiate, complete, monitor, and evaluate the policy and guidelines.

4. Delineates which procedures are mandatory or discretionary.

5. Identifies specific times for activities to be initiated or completed, when such times are known.

6. Permits the reader to easily understand the way in which he may access the system in order to meet his requirements either as the intended client of the policy or as one of the managers or administrators of the system.

EXAMPLE

Operators will develop and maintain on file their educational plan which outlines their policies, guidelines, procedures, intended results and how these will be achieved.
(E.C.S. Procedure)

EARLY CHILDHOOD SERVICES

POLICY

For the purposes of enhancing individual abilities and future educational opportunities, Alberta Education supports the provision of integrated services through parents, staff and community, which address the development needs of each child below the age of school entrance.

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GUIDELINES

1. Alberta Education supports the delivery of early childhood programs through public and private operators.

2. An "operator" is a school board or non-profit, community-based society incorporated under the Societies Act, or other legal entity which offers an early childhood program.

3. The provision of early childhood programs by school jurisdictions is voluntary.

4. Participation in early childhood programs is voluntary.

5. Operators are encouraged to support active parental participation in early childhood programs.

6. This program serves children one year prior to school entrance, and in the case of children with special needs, up to three years prior to school entrance.

7. Alberta Education provides funding for early childhood programs on a child-served basis.

8. For program approval purposes, operators are responsible for establishing and maintaining legal status, employing certificated teachers and utilizing approved facilities.

9. Operators are responsible for the formulation and implementation of policies, guidelines and procedures for the identification of, and response to, the developmental needs of each child.

10. Alberta Education supports the operators, in joint participation with staff, parents, and community, in developing, implementing, monitoring and evaluating programs.

11. Alberta Education is responsible for monitoring and evaluating the staff, program and facilities of private early childhood operators.

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PROCEDURES

1. Alberta Education will provide general information to operators in January in regard to the level of provincial support.

2. Operators will develop and maintain on file their educational plans which outline their policies, guidelines, procedures, intended results and how these results will be achieved.

3. New operators will submit by April 1, to the Regional Office of Education, notification of intent to provide Early Childhood Services in accordance with Alberta Education policies, guidelines and procedures.

4. Established operators shall retain for review or submission, as requested by their Regional Office of Education, documentation regarding legal status, teacher certification and facility approval.

5. Funds will be allocated by Alberta Education upon the submission of the operator's child count as at September 30.

6. Operators will submit information on the enrolment of children served, and on the type of service provided to the Regional Office of Education for approval by October 15.

7. Each operator will monitor and evaluate the instructional programs and their operations as required, in accordance with the operator's evaluation policies.

8. Regional Offices of Education will monitor programs as required.

9. Alberta Education will evaluate early childhood programs and operations as required. The results of the evaluation will become public documents.

10. Operators will submit two copies of their annual report to the local Regional Office of Education by July 31.

11. School Jurisdiction Operators will submit an annual audited financial statement to the School Business Administration Branch of Alberta Education by February 28. Non-profit operators will submit an annual audited financial statement to the School Business Administration Branch 30 days after the termination of the program year.

12. Depending on the outcome of the evaluations and the Alberta Education review of the annual reports, appropriate adjustments to the programs may be required at the provincial and local level.

FUNDING INFORMATION

A. INTRODUCTION

B. INFORMATION ADDENDUM TO 1984 SCHOOL GRANTS SCHEDULE OF JANUARY 12, 1984.

C. FINANCE TERMS

FUNDING INFORMATION

INTRODUCTION

As a part of the Management and Finance Plan, Alberta Education has developed a new approach to funding Education in the province. The new funding structure provides greater autonomy and flexibility to school jurisdictions in determining how provincial funds will be used to met the needs of students. This change in funding will be brought about through the introduction of funding through a lower level of conditionality in regard to grants with the exception of three general areas: capital grants for transportation, School Debt Retirement and specific grants for meeting the needs of students.

In 1984, school jurisdictions will receive at least the same level of funding as in 1983 with some enhancement for special needs of high priority. The 1984 School Foundation Program Fund (S.F.P.F.) per pupil grants will be maintained at the 1983 levels and no board will suffer reduced revenue from grant solely because of the implementation plan. However, reductions could occur from such factors as reduced enrolment, reduction of the corporate assessment loss grant, and significant increases in equalized assessment leading to a decrease in the Supplementary Requisition Equalization Grant.

CHANGES IN THE ALBERTA EDUCATION FUNDING STRUCTURE

The table on the following page compares the previous and the existing provincial funding structures. One result is that the provincial and local funding process will be simplified. Another consequence is that with fewer budget lines, school jurisdictions will have increased discretion and autonomy in determining how to use provincial funds in meeting local needs.

It should be noted that the following sections on the provincial funding structure and levels are illustrative only. Verification or questions in regard to information should be directed to the Regional Offices of Alberta Education.

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GENERAL COMPARISON OF PREVIOUS AND CURRENT FUNDING STRUCTURE

(FORMAT ONLY)

PREVIOUS PLAN	EXISTING PLAN
School Foundation Program Fund	**A. School Foundation Program Fund**
Per Pupil Grants - Instruction	Per Pupil Grants - Instruction
Transportation and Boarding Grants	Transportation and Boarding Grants
Administration Grants	
Debt Retirement and School Building Quality Restoration	**Debt Retirement and School Building Quality Restoration***
Fiscal Equalization Grants	**B. Equity Grants**
Supplementary Requisition Equalization Grants	
Private School Opening Grants to School Boards	
Small Jurisdiction Grants	
Small School Assistance Grants	
Declining Enrolment Grants	
Location Allowance	
Incremental Grants to School Boards	
Corporate Assessment Grants	
Other Fiscal Equilization Grants	
Regular and Special Education Program Grants	**C. Special Need Grants**
1. Regular Education and Special Program Grants	**1. Pupil Needs**
Vocational Classes	Special Education: Per Pupil Grants
Extension Programs	Other: Sensory Multi-handicapped Grants
Research	Institutional Grants
Official Language Grant	Vocational Education
Interdepartmental Community Schools	Official and Other Language Grants
English As a Second Language	Extension Programs
Other Special Program Grants	Early Childhood Services
Total Regular Education and Special Program Grants	E.O.F.
2. Special Education Grants	**2. General Needs**
Teachers of Special Classes	Interdepartmental Community Schools
Instruction in Schools for Retarded Children	Education Research
Special Education Program Unit Grants	Films for Librairies
Rehabilitation Aides	Inservice Education
Sensory Multihandicapped	
Other Special Education Grants	
Other Sub-Programs	**D. Other Service Programs**
Grants to Private Schools	Teachers' Pensions
Grants to Private Schools	Grants to Private Schools
Early Childhood Services	
Grants to Early Childhood Programs	
Education Opportunity Fund	
Educational Opportunity Fund Grants	
Special Assistance to School Boards	
Teachers' Pensions	
Textbooks and Readers	
Films for Librairies	
Computer Technology Administration	
Learning Disability Fund	
Learning Disability Fund Grants	

* (To be displayed separately in 1984-85 Budget).

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INFORMATION ADDENDUM TO 1984 SCHOOL GRANTS SCHEDULE OF JANUARY 12, 1984

(SAMPLE ONLY)

	Grant Program	1983	1984	Contact Person
1.	**Language Program: English As A Second Language** (Effective Sept. 1, 1984)	$15,820 per approved teaching position.	$600 per FTE pupil served.	A.L.(Adrien) Bussie 427-0183 or Regional Office Director
2.	**Teacher Inservice** (Effective Sept. 1, 1984)	No program in 1983.	$9.00 per eligible pupil (1-12). $5.40 per ECS pupil.	G.H.(George) Bevan 472-2984 or Regional Office Director
3.	**Vocational Education** (Effective Sept. 1, 1984)	$38.30 per C.E.U. for grant - eligible pupils in 12; 15 courses if minor courses. $38.30 per C.E.U. for 22, 32; 25, 35 courses. Non resident: $13.90 per C.E.U. additional to $38.30 C.E.U.	$19.15 per C.E.U. for all enrolment in 12; 15 courses. $38.30 per C.E.U. in 22, 32; 36, 36 courses. Shop Facilities claiming option has been eliminated. Jurisdictions experiencing a revenue loss as a result of the changes will be grandfathered, ie, will receive an amount of support in 1984 equivalent to the amount received in 1983. The non-resident additional support has been eliminated.	A.A.(Scotty) Day 427-2980 or Regional Office Director

1984 05 31

Grant Program	1983	1984	Contact Person
Academic Occupational (Effective Sept. 1, 1984)	$800 per pupil in an approved A/O Vocational Program	$40.00 per C.E.U. For Vocational courses in an A/O Vocational Program.	A.A.(Scotty) Day 427-2980 or Regional Office Director
BQRP Business Education Equipment (Effective Sept. 1, 1984)	No program in 1983.	Provided under separate cover.	F.J.(Fiore) Berlin 427-2973 or Regional Office Director
Special Education (Effective Sept. 1, 1984)			H.J.(Heleen) McLeod) 427-2929 or Regional Office Director
A. Resident Pupil Block	See 1983 Grants Order	$135 per Resident Pupil.	
B. Gifted and Talented	No program in 1983.	If grandfathered, a jurisdiction will receive a minimum of 2% of what the entitlement would have been under the resident pupil formula, excluding Institutional. For a jurisdiction being grandfathered at 1983 levels, the rate for gifted and talented is included in the block funding formula and will range 2 to 5% of the total formula funding.	

1984 05 31

Grant Program	1983	1984	Contact Person
C. Institutional	Special Education Teaching Position: $20,400 per approved teaching position.	Institutional Support grant: $20,400 per approved teaching positions continues.	
7. Transportation	See SFPF Regulation and 1983 School Grants Regulations.	Changes in addition to those already provided will be announced soon.	E.F.(Ed) Bardock 427-7235 or Regional Office Director

NOTE: Direct questions to the Regional Office Director listed on the following page.

1984 05 31

REGIONAL OFFICE OF EDUCATION DIRECTORS

Mr. Steve Cymbol, Director
Grande Prairie Regional Office of Education
5th Floor, Nordic Court
10015 - 99 Street
Grande Prairie, Alberta
T8V 3N4
Phone: (403) 539-2130

Dr. Frank Crowther, Director
Edmonton Regional Office of Education
3rd Floor, Edwards Building
10053 - 111 Street
Edmonton, Alberta
T5K 2H8
Phone: (403) 427-2952

Mr. Clarence Emard, Director
Red Deer Regional Office of Education
3rd Floor, West, Provincial Building
4920 - 51 Street
Red Deer, Alberta
T4N 6K8
Phone: (403) 340-5262

Mr. Gerry Wilson, Director
Calgary Regional Office of Education
1200 Rocky Mountain Plaza
615 MacLeod Trail, S.E.
Calgary, Alberta
T2G 4T8
Phone: (403) 297-6353

Mr. Marvin Bruce, Director
Lethbridge Regional Office of Education
Provincial Building
200 - 5th Avenue South
Lethbridge, Alberta
T1J 4C7
Phone: (403) 329-5243

1984 05 31

FINANCE TERMS

1. ELIGIBLE PUPIL is defined as "pupil" under the SFPF Regulations, 1983, section I, (h):

(h) "pupil" means a person

(i) attending school during the normal operating hours for schools in Alberta between the hours of 8:00 a.m. and 6:00 p.m., Monday to Friday where the school is

(A) a school operated by a board,

(B) a school in another province operated by a board of trustees or similar body with which the board having jurisdiction over the person has a tuition agreement in respect of that person under section 169(c) of the Act,

(C) a private school with which the board having jurisdiction over the person has a tuition agreement in respect of the person under section 169(a) of the Act, or

(D) a school operated by the Government of Canada with which the board having jurisdiction over the person has an agreement in respect of the person under section 169(a) of the Act;

(ii) who is at least 5 years 6 months of age but less than 20 years of age on September 1 in the school year in which he is counted,

(iii) at least one whose parents is ordinarily a resident in Alberta,

(iv) with appropriate visas who reside with an Alberta resident who is an appointed guardian under Part 7 of the Domestic Relations Act,

(v) with appropriate visa arrangements who are <u>completely</u> maintained, supported and controlled by another person,

(vi) who is not counted by another board or private school under this regulation or The School Grants Regulations, (Alta. Reg. 171/76),

(vii) who is not an Indian enrolled in a school of a board that receives payment from the Government of Canada in respect of that person; and

(viii) who is not a person in

(A) a school operated by the Government of Alberta; or

(B) a school or portion of a school in respect of which the Government of Alberta is providing financial assistance based on a share of the cost of operation of the school or portion of the school.

Excluded from the foregoing definition are pupils who are day extension students, i.e., persons more than 20 years of age inclusive as at September 1, in the year in which they are counted and who are enrolled in day extension courses where the hours of instruction are less than 25 hours per credit (or in the case of a three credit course, less than 62.5 hours).

Eligible pupils also include pupils as defined under section 3 of the SFPF Regulations, 1983, for purpose of SFPF Instructional grants under section 2:

> In respect of pupils who reside in a school district established for the purpose of educating the children of employees of the Government of Canada, payments made under section 2 shall be 50% of the amounts referred to in section 2.

2. ENROLLED PUPIL - is a pupil who is listed on the school register and is attending a regular school day program as outlined in the Program of Studies.

3. FULL TIME EQUIVALENT (FTE) - is a term to define part-time students or teachers in terms of what full time participation would be. For example, for determining full time equivalencies, children are defined as .5 FTE pupils for count purposes because ECS programs are half-day programs.

4. INDEX OF INSTRUCTIONAL TIME - where a grant for a program is based on a recommended or maximum number of hours, the entitlement for a lesser time is prorated as a percentage of the maximum time. For example, if a grant for a program is based on $50 per pupil for a 100 hour program, and the program is 80 hours in duration, the entitlement is prorated by the ratio which 80 hours bears to 100, or $50 X $\frac{80}{100}$ = $40

5. MATCHING GRANT - a matching grant is essentially a provincial/local sharing grant. If a local jurisdiction contributes $2 per pupil, Alberta Education contributes $2 per pupil. Such grants are often limited for both minimum and maximum contributions.

6. A PER PUPIL SERVED RATE - is usually a grant rate in dollars per pupil enrolled in a specific program.

7. RATE PER APPROVED TEACHING POSITION - in some programs, it is administratively too complicated or inequitable to provide support on a per pupil basis, because the number of pupils in the program is subject to large fluctuations during a school year. For this reason, support is provided for essential programs upon the most stable element in such a situation, namely the teaching positions.

8. RESIDENT PUPIL - To be developed.

1984 05 31

SCHOOL JURISDICTION EDUCATION PLAN

OVERVIEW

As stated earlier the School Jurisdiction Educational Plan is kept on file at the local level. The first plan is to be on file by September 1985. The plan is expected to outline the jurisdiction's mission statement or purpose, goals, policies, guidelines and procedures, its program offerings and what results the jurisdiction intends to achieve in the upcoming school year. However, the format utilized for the presenting of these materials is initially left to the discretion of the local jurisdiction.

For example, some local jurisdictions include their mission statement (purpose) and their goals at the front of their annual budget statement while others keep this information as a separate item. However the information is kept, the documentation maintained at the local level must reflect the information requirements of the jurisdiction's Educational Plan. This may be accomplished by providing the information in a single document entitled the School Jurisdiction Education Plan or in a series of documents which achieve the same purpose. A series of documents might include the Education Plan which outlines the jurisdiction's mission statement and goals, a policy manual which outlines their program offerings and its intended results and a yearly budget. However the local jurisdictions prepare the School Jurisdiction Education Plan it must be kept on file at the local level and must provide:

- a mission statement for purpose which states the overall philosophy and what the organization intends to do.

- goals, policies, guidelines and procedures like those found in the Department's Program Policy Manual which have been developed to facilitiate the delivery and evaluation of programs at the local level.

- a written statement of intended results which outlines what the school jurisdiction intends to accomplish with the resources at its disposal.

This component of the management process still requires detailed discussion and further development with the school jurisdictions. This process will occur during the period July 1984 - January 1985.

PHASE TWO: PROGRAM DELIVERY AND MONITORING

- INTRODUCTION
- GRANT APPLICATION FORM
  Introduction
  Sample of Grant Application Form
- MONITORING

INTRODUCTION: PROGRAM DELIVERY AND MONITORING

The second phase of the management process includes the:

- Grants Application Form, which includes verification that the jurisdiction's Education Plan and the programs for which the grants are requested, are in place.
- delivery of programs at the local level. This will not be discussed as a separate item.
- monitoring of programs delivered at the local level by Alberta Education and the school jurisdiction.

DRAFT: GRANT APPLICATION FORM

The Grant Application Form (GAF) is submitted to the appropriate Regional Office of Education. The submission to and acceptance by Alberta Education of the information provided in the GAF allows for the release of funds by Alberta Education for program delivery at the local level. A draft Grant Application Claim form begins on the next page.

The draft Grant Application Form will be field tested in June, 1984. Revisions will occur as required.

SAMPLE OF GRANT APPLICATION CLAIM FORM

1984 05 31

Alberta
EDUCATION

GRANT APPLICATION FORM

SPECIAL NEEDS GRANTS

- School Extension
- Special Education
- Institutional
- Education Opportunity Fund - Elementary
- Language Programs
- Teacher Inservice
- Vocational Education

INSTRUCTIONS:

1. The Grant Application Form is to be completed for those programs offered in accordance with Alberta Education Policies, Guidelines, Procedures and Regulations.

2. Complete the applicable sections of the enclosed Grant Application Form and forward to the appropriate Regional Office of Education or as otherwise indicated on individual forms.

3. **Submission Timelines:**

   (a) Those forms submitted once each year and those for the first semester/trimester: **OCTOBER 15**

   (b) Those forms submitted for the second semester/trimester: **MARCH 15**

   (c) Those forms to be submitted for the third trimester: **MAY 15**

   (d) Those forms to be submitted for the summer school extension program: **AUGUST 15**

Alberta
EDUCATION

SCHOOL EXTENSION PROGRAM

For the School Year _____ 19 __ To _____ 19 __

I. Grades 1 to 12

INSTRUCTIONS:

a) Submit a form for each semester or trimester and summer program to the appropriate Regional Office of Education.

b) The enrollment count will be as at the last school day of the following months:
   i) First semester/trimester - September
   ii) Second semester/trimester - February
   iii) Third trimester - April
   iv) Summer school - July

c) Ten month course(s) should be listed on the first semester/trimester application only.

PLEASE COMPLETE REVERSE.

I hereby certify the information provided herein is true and correct.

_____ (Secretary-Treasurer)

_____ (Superintendent)

Date: _____

_____ District
Division No. ____
County

REGIONAL OFFICE OF EDUCATION:

PERFORMANCE CERTIFIED:

_____ (Director or Designate)

Date: _____

Forward to Executive Director, Interdepartmental Community Schools

---

REVIEWED:

_____ (Executive Director - IDCSC)

Date: _____

(1)	(2)	(3)					(4)	(5)	(6)	(7)	(8)
		Course Offered Code SEE BELOW					Time of Day Course Offered (x)				
Course Name	Grade Level	10	1	2	3	SS	Day	Evening	Enrol-ment in Course	Number of Hours Course Offered	Enrolment Course Hours* Col. (6)x(7)

Alberta
EDUCATION

SCHOOL EXTENSION PROGRAM
II.ADULT BASIC EDUCATION
(Program Proposal and Grant Determination)
Grade 1-9 (20 hours per week)

School Year _____ 19 __ To _____ 19 __

Because this is a new, developing program area, and because of a desire to move in a judicious studious way, programs in this category of School Extension Grants must have the approval of the Alberta Education Extension Office prior to being offered.

1. **Submit only one proposal for the program year.**

2. **At least 60 days prior to planning to implement your program, please submit two copies of your program proposal to:**

   Dr. Brian Staples
   Executive Director
   Interdepartmental Community Schools
   2nd Floor Edwards Building
   10053 - 111 Street
   EDMONTON, Alberta
   T5K 2H8
   Phone: 427-2037

3. In your proposal, please address the following:

   Students a). Number to be served. b). Student class time daily, weekly, monthly, semesterly, yearly. c). Counselling and recruitment arrangements. d). Grade level. e). Post program follow-up or placement. f). Total student course hours. g). Registration fee arrangement. h). Average class size projection.

   Program i). Learning approach. j). Facility arrangement. k). Interagency contact arrangement. l). Needs identification documentation. m). Learning resource arrangement. n). Secretarial support arrangement. o). Program supervision arrangement. p). Evaluation procedure.

   Staff q). Staff number and teaching time (F.T.E.) r). Staff selection and recruitment. s). Staff payment method. t). Staff benefit arrangement. u). Staff tenure arrangement. v). Staff professional development arrangement. w). Staff training and experience. x). Staff linkages with teachers of regular programs.

   Budget y). Based on guide of $5.00 per enrolment course hour, indicate the grant amount, and also other revenues and projected expenditures of revenues.

   Other z). Please feel free to add other documentation if you think it will help describe and make a case for your proposal. Please feel free to consult with Dr. Staples in developing your proposal.

School Jurisdiction _____ Address _____ Phone _____

Superintendent _____ Address _____ Phone _____

Secretary-Treasurer _____ Address _____ Phone _____

School Officer I/C School Extension _____ Address _____ Phone _____

Proposal Origination _____ Address _____ Phone _____

Number of students to be served _____
Total Enrolment Course Hours _____
Total Grant Request _____ (Total enrolment course hours x $5)

ALBERTA EDUCATION USE ONLY: Date Received: _____

Approval _____ Effective Date: _____
(Executive Director, IDCSC)

Amount _____ Copy to Regional Office _____

Approval Communicated to School Jurisdiction _____ Date _____

Approval Communicated to Grants Office _____ Date _____

Alberta
EDUCATION

FOR THE SCHOOL YEAR: _____ to _____

SUBMIT ONLY ONE FORM FOR THE SCHOOL YEAR TO THE APPROPRIATE REGIONAL OFFICE OF EDUCATION.

PROGRAM	MARK THE APPROPRIATE BOX WITH AN (X)			DATA REQUIRED BY ALBERTA EDUCATION FOR a) GRANT DETERMINATION b) STATISTICAL REPORTING	FOR DEPARTMENT USE ONLY
	Is this the first year you are offering the Program?	Do you have Policies, Guidelines, and Procedures?	Is the Program currently operating?		
SPECIAL EDUCATION PROGRAM	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	NUMBER OF PUPILS SERVED IN PROGRAM AREAS: a) Gifted and Talented _____ b) Hearing Impaired _____ c) Vision Impaired _____ d) Speech Handicap _____ e) Dependent/Multiple Handicap _____ f) Home Bound/Hospital _____ g) EMF/TMH _____ h) Socially Maladjusted _____ i) Learning Disabled _____ **Note:** Grant paid on Resident Pupil count. (See Reverse)	
	Are you directing pupil to other jurisdictions for this program ___ Yes ___ No COMMENTS: _____				
INSTITUTIONAL	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	NUMBER OF TEACHING POSITIONS AND PUPILS SERVED BY INSTITUTION: a) INSTITUTION: _____ No. of Approved Teaching Positions: _____ No. of Pupils: _____ b) INSTITUTION: _____ No. of Approved Teaching Positions: _____ No. of Pupils: _____ c) INSTITUTION: _____ No. of Approved Teaching Positions: _____ No. of Pupils: _____	
	COMMENTS: _____				

_____ Division
S. District No. _____
County

SPECIAL EDUCATION PROGRAM GRANT

PUPIL DATA

A. Number of non-resident pupils being served by Special Education programs in your schools (excluding Institutions)

B. The resident pupil enrollment count for calculating the grant payable includes the following pupils:

1. Pupils resident in a district, division or county attending a school of the Board.

2. Pupils resident in a district, division or county and directed by the resident board to attend a school of another district, division or county.

3. Pupils attending a Category 2 Private School under a tuition agreement.

4. Pupils attending a Category 1 or 4 Private School.

5. Residents of institutions and group homes where these pupils attend local schools as SFPF eligible pupils.

6. Resident pupils receiving approved home instruction.

Note: DND pupils in DND district schools count eligible pupils as resident. (Report in 1. below). Applicable rate is $67.50 or 50% of the board per pupil rate.

	ELEM.	JR. HIGH	SR. HIGH	TOTAL
1. Resident pupils attending a school of the board				
2. Resident pupils attending schools of another district division or county				
3. Resident pupils attending a Category 2 Private School under a tuition agreement.				
4. Resident pupils attending a Category 1 or 4 Private School				
5. Residents of institutions and group homes where these pupils attend schools of the board as SFPF eligible pupils				
6. Resident pupils receiving approved home instruction				
TOTAL				

Alberta
EDUCATION

FOR THE SCHOOL YEAR: _____ to _____

SUBMIT ONLY ONE FORM FOR THE SCHOOL YEAR TO THE APPROPRIATE REGIONAL OFFICE OF EDUCATION.

PROGRAM	MARK THE APPROPRIATE BOX WITH AN (X)			DATA REQUIRED BY ALBERTA EDUCATION FOR a) GRANT DETERMINATION b) STATISTICAL REPORTING	FOR DEPARTMENT USE ONLY
	Is this the first year you are offering the Program?	Do you have Policies, Guidelines, and Procedures?	Is the Program currently operating?		
EDUCATIONAL OPPORTUNITIES FUND - ELEMENTARY	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	**NOTE: Grant Paid on SFPF Eligible Elementary Enrolment.**	
	COMMENTS: _____				
LANGUAGE PROGRAMS (i) English As a Second Language	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	NUMBER OF PUPILS SERVED IN THE E.S.L. PROGRAM: _____ **(SEE REVERSE FOR ADDITIONAL INFORMATION)**	
	COMMENTS: _____				
(ii) Languages Other Than English or French	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	NUMBER OF PUPILS SERVED: a) German _____ b) Ukrainian _____ c)Hebrew/Yiddish _____ d) Chinese _____ e) Arabic _____	
	COMMENTS: _____				

_____ Division
S. District No. _____
County

ENGLISH AS A SECOND LANGUAGE

Pupils are eligible for grant for a maximum period of two years. Please provide the following information to substantiate payment eligibility:

1983/84 SCHOOL YEAR		1984/85 SCHOOL YEAR	
Pupil Name	Birthdate	Pupil Name	Birthdate

Note: Should this information be collected on the grant application form or should this be maintained in the board office and reviewed on a post audit basis?

Alberta
EDUCATION

FOR THE SCHOOL YEAR: _____ to _____

SUBMIT ONLY ONE FORM FOR THE SCHOOL YEAR TO THE APPROPRIATE REGIONAL OFFICE OF EDUCATION.

PROGRAM	MARK THE APPROPRIATE BOX WITH AN (X)			DATA REQUIRED BY ALBERTA EDUCATION FOR a) GRANT DETERMINATION b) STATISTICAL REPORTING	FOR DEPARTMENT USE ONLY
	Is this the first year you are offering the Program?	Do you have Policies, Guidelines, and Procedures?	Is the Program currently operating?		
TEACHER INSERVICE	___ Yes ___ No	☐ Yes ☐ No	☐ Yes ☐ No	**Note:** Grant Paid on E.C.S. and SFPF eligible enrollments.	
	COMMENTS: _____				

I hereby certify the information provided herein is true and correct:

_____ Secretary-Treasurer

_____ Superintendent

DATE: _____

_____ Division
District No. _____
County

REGIONAL OFFICE OF EDUCATION:

PERFORMANCE CERTIFIED:

Signed:

_____
DIRECTOR OR DESIGNATE

DATE: _____

Alberta
EDUCATION

VOCATIONAL EDUCATION PROGRAM

FOR THE SCHOOL YEAR _____ 19__ to _____ 19__

INSTRUCTIONS:

a) Submit an application form for each semester to the appropriate Regional Office of Education.

b) The credit enrolment unit count will be as at:
   i) September 30 for the First Semester application
   ii) February 28 for the Second Semester application.

c) Credit enrolment units for ten-month courses should be reported on the first semester claim only.

d) Credit enrolment units reported in the first semester must not be reported in the second semester.

THIS APPLICATION IS FOR THE (indicate "X"):

First Semester ☐

Second Semester ☐

I. VOCATIONAL EDUCATION PROGRAM

a) Number of *C.E.U.'s for courses numbered 12 and 15 _____ X $19.15 = $_____(i)

b) Number of *C.E.U.'s for courses numbered 22,32,25,35 _____ X 38.30 $_____(ii)

* C.E.U. = Credit Enrolment Unit. One C.E.U. equals one student in one course for one credit. 5 C.E.U.'s = one student in a 5 credit course.

II. ACADEMIC-OCCUPATIONAL PROGRAM

Number of Credit enrolment units _____ X $38.30 $_____(iii)

GRANT FOR THE SEMESTER $_____

Total of (i),(ii)&(iii)

_____ Secretary-Treasurer

_____ Superintendent

_____ DIVISION
DISTRICT NO._____
COUNTY

REGIONAL OFFICE OF EDUCATION:

PERFORMANCE CERTIFICATION:

_____
DIRECTOR OR DESIGNATE

Alberta

EDUCATION

SCHOOL FOUNDATION PROGRAM FUND
For the school year September 1, 1984 to June 30, 1985.

I. STUDENT INFORMATION

A. PUPILS ENROLLED (FORM A1DBC-320A - As at September 30, 1984)

GRADES	E.C.S.	I-VI	VII-IX	X-XII	TOTAL	DEPT. USE
Total Enrolment						
Add: * Pupils Educated in Private Schools Please Complete Reverse						
* Pupils attending Schools Outside of Alberta						
Non-D.N.D. Pupils Attending D.N.D. Schools						
Less: Non-Resident Foreign Pupils						
Less: D.N.D Pupils						
Less: Sec. 1(h)(v) Indian Pupils						
Less: **Students 19 years and over as at Sept. 1/84						
Eligible Enrolment						

* TUITION AGREEMENT APPROVED BY THE MINISTER.
** DEDUCT ONLY STUDENTS ENROLLED IN THE EXTENSION DAY PROGRAM.

B. DEPARTMENT OF NATIONAL DEFENCE PUPILS
(Form A1DBC-320A - As at September 30, 1984)

GRADES	E.C.S.	I-VI	VII-IX	X-XII	TOTAL	DEPT. USE
Total Enrolment						
Less: Persons less than 5 yrs. 6 mos. as at Sept. 1/84 (Grades 1-12)						
Less: **Persons 19 years and over as at Sept. 1/84						
Eligible D.N.D. Enrolment						

I, _____ of
(Signature of Secretary-Treasurer)

_____
(Name of School Board)

hereby certify that the information contained herein is true and correct.

REPORT OF PUPILS ATTENDING PRIVATE SCHOOLS

Pursuant to Section 1 (g) of The S.F.P.F. Regulations

Data as at September 30, 1984

Name of Pupil (Print Surname first and arrange in Alphabetical Order by grades, beginning with lowest grade)	Age as at Sept. 1/84	Grade	Name of Private School Attending With Whom There is an Agreement*

Alberta

EDUCATION

II. SCHOOL FOUNDATION PROGRAM FUND

RURAL TRANSPORTATION

AS AT SEPTEMBER 30, 1984. For the school year September 1, 1984 to June 30, 1985.

BUS ROUTE IDENTIFICATION, DISTANCE AND PASSENGER DATA.

INSTRUCTIONS

1. Report only the information pertaining to regular daily conveyance.
2. Where a school bus makes more than one regular run in the morning and/or evening, each run and its pupil load is to be identified. ONLY THE MAXIMUM NUMBER OF ELIGIBLE PASSENGERS TO BE ACCOMMODATED AT ONE TIME CAN BE USED IN CALCULATING THE LOAD FACTOR. However, the other load should be listed under eligible passengers but bracketed to indicate they are not to be counted.
3. Please list eligible passengers from unorganized territory on reverse side of form.

Route No.	Daily Route Eligible Distance Section 1(i) S.F.P.F. Nearest Whole Kilometre	Total Days of Operation	Ineligible Passengers	Eligible Passengers (Excl. Wheelchair Passengers to be used for Load Factor Count (b) Section 1(b) S.F.P.F.		Aides Accompanying Handicapped Pupils	Wheelchair Passengers	Manufacturer's Rated Capacity	For Department Use
				1-6	7-12				
PAGE TOTAL									
GRAND TOTAL									

ELIGIBLE PASSENGERS FROM UNORGANIZED TERRITORY

Name	Birthdate	Grade	Legal Land Description of Residence

Alberta
EDUCATION

SCHOOL FOUNDATION PROGRAM FUND

RURAL TRANSPORTATION

AS AT SEPTEMBER 30, 1984 For the school year September 1, 1984 to June 30, 1985.

UNSUPPORTED PASSENGER DATA

Persons who are counted as eligible passengers who are:
(1) Indians enrolled in a school of a board that receives payment from the Government of Canada in respect of those Indians,
(2) Children of employees of the Government of Canada whose parents reside in a school district established to educate them,
(3) Others e.g., Residents outside of Alberta, are not eligible for grant support.

Also include No. of unsupported passengers from page 3 vehicles other than school busses.

	1) Indian	2) D.N.D.	3) OTHER	TOTALS
Gr. 1 - 6				
7 - 12				
TOTAL NO.				

MODIFIED BUS DATA

NUMBER OF BUSSES MODIFIED FOR WHEELCHAIRS _____

NUMBER OF APPROVED SEATS REMOVED _____

NON-OPERATING DAY DATA

TYPE OF NON-OPERATING DAY	Dates of Non-Operating Days for the 1984/85 School Year	Total No. of Non-Operating Bussing Days
ELIGIBLE		
Parent-Teacher Interviews		
Teacher Convention		
Professional Development		
Inservice Days		

REGULAR TRANSPORTATION BETWEEN SCHOOLS DATA

1) Course of study must be approved and require special facilities or equipment for at least 18 weeks

APPROVED COURSES OF STUDY	DISTANCE BETWEEN SCHOOLS	NUMBER OF DAYS TRANSPORTED

_____ District
S. Division No.
County

Alberta

EDUCATION

RURAL TRANSPORTATION

AS AT SEPTEMBER 30, 1984 For the school year September 1, 1984 to June 30, 1985.

VEHICLES OTHER THAN SCHOOL BUSSES

Please include the number of unsupported passengers in vehicles other than school busses in unsupported passenger data on page 2.

Vehicle Type Identification	Number of Families per Vehicle	Daily Route Eligible Distance	Number of Days Transported	Department Use Only

SPECIAL EDUCATION TRANSPORTATION

SFPF Regulations Sec. 8 has been deleted. Grants in lieu of transportation are no longer available for parent-provided transportation.

SFPF Regulations Sec. 7 (1) & (2) Grants in lieu of Regular Transportation (Handicapped) have been coalesced and will be paid for handicapped pupils enrolled on September 30, 1984 and **transported by either parent and/or agent.** The payment will be $1 140/Pupil/Year.

SFPF Regulation Sec. 7 (5) Weekend transportation (Handicapped) will be paid for handicapped pupils enrolled on September 30, 1984 who require weekend transportation. The payment will be $2 000/Year/Pupil.

Number of handicapped pupils transported as at September 30, 1984 by Agent and/or Parent. _____

Number of pupils requiring transportation on weekends. _____

BOARDING ALLOWANCE

SFPF Regulations Sec. 10 Maintenance (Boarding) Allowance will be paid for pupils enrolled on September 30, 1984 who with board approval are attending a school that requires the pupil's absence from his residence. The payment will be $1 800/Pupil/Year.

Number of pupils being maintained as at September 30, 1984 in a temporary residence. _____

_____ District S. Division No. _____ County

Alberta

EDUCATION

II. SCHOOL FOUNDATION PROGRAM FUND

URBAN TRANSPORTATTION

REPORT OF ELIGIBLE TRANSPORTED PUPILS AS AT SEPTEMBER 30, 1984
For the school year September 1, 1984 to June 30, 1985.

Number of Eligible Transported Pupils in Regular Programs _____

Number of Eligible Transported Pupils Enrolled in Language Program Classes _____

SPECIAL EDUCATION TRANSPORTATION

SFPF Regulations Sec. 8 has been deleted. Grants in lieu of transportation are no longer available for parent-provided transportation.

SFPF Regulations Sec. 7 (1) & (2) Grants in lieu of Regular Transportation (Handicapped) have been coalesced and will be paid for handicapped pupils enrolled on September 30, 1984 and **transported by either parent and/or agent.** The payment will be $1 140/Pupil/Year.

SFPF Regulation Sec. 7 (5) Weekend transportation (Handicapped) will be paid for handicapped pupils enrolled on September 30, 1984 who require weekend transportation. The payment will be $2 000/Pupil/Year.

Number of handicapped pupils transported as at September 30, 1984 by Agent and/or Parent. _____

Number of pupils requiring transportation on weekends. _____

BOARDING ALLOWANCE

SFPF Regulations Sec. 10 Maintenance (Boarding) Allowance will be paid for pupils enrolled on September 30, 1984 who with board approval are attending a school that requires the pupil's absence from his residence. The payment will be $1 800/Pupil/Year.

Number of pupils being maintained as at September 30, 1984 in a temporary residence. _____

_____ District
S. Division No. _____
County

Alberta
EDUCATION

SCHOOL FOUNDATION PROGRAM FUND REGULATIONS
Report of Short Term Captial Loans to part D 16

Date		Amount		Amount		Purpose(s) of Loan	Interest Rate	Term	Outstanding Eligible Bal. Dec. 31, 1983		1984 Claim	
Authorized	Borrowed	Authorized	Borrowed	Eligible	Ineligible					Eligible Principal	Eligible Interest	Total

I, _____ of _____
Signature of Secretary-Treasurer Name of School Board
hereby certify to the best of my knowledge that the information contained herein is true and correct.

_____ Division
S. District No.____
County

Net Capital Loans (MAE02 & MAE22)
Supported Debenture Debt (MAE01 & MAE11). Transferred from EDISD215 Report

Shielded Interest (MAE03) Transferred from EDISD215 Report

Total Debt Retirement

** JURISDICTION DETAIL **

JURIS CODE 1150 JURIS NAME WAINWRIGHT SCHOOL DIV #32

DEB. NUMBER	COST FLAG	SUPPORTED PRINCIPAL	SUPPORTED INTEREST	SHIELDED INTEREST	TOTAL AMOUNT PAID	UNSUPPORTED PRINCIPAL	UNSUPPORTED INTEREST	UNSUPPORTED TOTAL PAID	%	ANNUAL PAYMENT
61001	E	2,640.00	455.40	0.00	3,095.40	0.00	0.00	0.00	0.0000	3,095.40
61002	F	3,600.00	621.00	0.00	4,221.00	0.00	0.00	0.00	0.0000	4,221.00
62001	F	4,000.00	920.00	0.00	4,920.00	0.00	0.00	0.00	0.0000	4,920.00
63001	F	11,568.88	3,326.05	0.00	14,894.93	991.12	284.95	1,276.07	7.8911	16,171.00
68001	F	1,400.00	1,050.00	0.00	2,450.00	0.00	0.00	0.00	0.0000	2,450.00
69001	F	30,000.00	24,750.00	0.00	54,750.00	0.00	0.00	0.00	0.0000	54,750.00
69002	F	8,000.00	7,040.00	0.00	15,040.00	0.00	0.00	0.00	0.0000	15,040.00
69003	F	983.84	865.78	0.00	1,849.62	11,016.16	9,694.22	20,710.38	91.8013	22,560.00
70001	F	1,706.88	1,741.02	0.00	3,447.90	6,293.12	6,418.98	12,712.10	78.6640	16,160.00
72001	F	144.00	156.24	0.00	300.24	0.00	0.00	0.00	0.0000	300.24
72002	E	320.00	347.20	0.00	667.20	0.00	0.00	0.00	0.0000	667.20
EST.		2,960.00	802.60	0.00	3,762.60	0.00	0.00	0.00	0.0000	3,762.60
FINAL		61,403.60	40,470.09	0.00	101,873.69	18,300.40	16,398.15	34,698.55	25.4067	136,572.24
TOTAL		64,363.60	41,272.69	0.00	105,636.29	18,300.40	16,398.15	34,698.55	24.7255	140,334.84

INFORMATION FOR THIS REPORT WAS COMPILED BY: SCHOOL BUSINESS ADMINISTRATION SERVICES

REPORT ON ENROLMENT

FOR EARLY CHILDHOOD SERVICES PROGRAM

AS OF SEPTEMBER 30, 1984

INSTRUCTIONS ON REVERSE: BY SCHOOL/CENTRE

FOR DEPARTMENT USE ONLY

EDIS School Code (5–8) ____

School Abbreviation (9–13) ____

Type of Enrolment	14		17
	Time	Year	Type

Name of School/Centre: _____

Address: _____

No. of ECS Classrooms (not classes) operating in this School/Centre: _____

Name of Operator: _____

Type of Enrolment (Check one box only): Non Resident Foreign Children ☐ 4 Treaty Indians ☐ 3 Others ☐ 1

Grade 1 age entrance in your School Jurisdiction: _____ Yrs. _____ Mos. As at _____

Program Commencement Date: _____ Termination Date: _____

Total no. of classroom instructional hours per child in above period: _____

Total no. of visits by teacher/aide to the home of child to deliver program: _____

No. of children instructed in a language other than English or French: _____

Name of language program offered: _____

Total no. of instructional hours in language program in above period: _____

CHILDREN COUNTED AS AT SEPTEMBER 30, 1984 IN THE ABOVE SCHOOL/CENTRE

AGE AS OF SEPTEMBER 1, 1984				Total By Age	No. Of Special Needs Children By Age
MALES BY AGE	18				
2 yrs 6 mos but less than 3 yrs 6 mos	1	02	15		
3 yrs 6 mos but less than 4 yrs 6 mos	1	03	15		
4 yrs 6 mos but less than 5 yrs 6 mos	1	04	15		
5 yrs 6 mos but less than 6 yrs	1	05	15		
TOTAL MALES	1	30	15		
FEMALES BY AGE	18				
2 yrs 6 mos but less than 3 yrs 6 mos	2	02	15		
3 yrs 6 mos but less than 4 yrs 6 mos	2	03	15		
4 yrs 6 mos but less than 5 yrs 6 mos	2	04	15		
5 yrs 6 mos but less than 6 yrs	2	05	15		
TOTAL FEMALES	2	30	15		
TOTAL MALES AND FEMALES					

I hereby certify that, the information contained in this report is correct. Further, except for enrolment counts, I hereby undertake to inform the appropriate Regional Office of Alberta Education of any changes to this report.

_____ DATE: _____

Signature of Secretary/Treasurer

REGIONAL OFFICE OF EDUCATION: USE ONLY

Performance Certified:

_____ DATE: _____

Signature of Director or Designate

NOTES AND INSTRUCTIONS IN COMPLETING FORM EDIS-FE004

(1) NAME OF SCHOOL: This would be the given name of the school or centre in which ECS class(es) are being operated. e.g. John Doe Elementary School or Edmonton Community Hall, etc.

(2) TYPE OF ENROLMENT: For each school, or centre, complete one form for each of the following:

a) NON RESIDENT FOREIGN CHILDREN: For the purpose of this report, such a person is defined as a student from a foreign country

(i) who is attending school in Canada

(ii) whose natural or adoptive parent resides in a country (as a citizen of that country), and

(iii) who is not completely maintained, supported and controlled by an Alberta resident.

b) TREATY INDIAN: For the purpose of this report "Treaty Indian" is defined as a person who is an Indian enrolled in the school of a board that receives payment of a tuition fee from the Government of Canada in respect of that person. Usually these children reside on an Indian reserve.

c) All other children.

(3) CHILD'S AGE: Age of each child must be determined as of **September 1** not September 30, in the school year in which he/she is counted.

(4) CHILDREN ELIGIBLE FOR FUNDING: Children whose age on September 1, is:

(i) 1 year less than the minimum age for school entrance set by the local school board, or

(ii) In the case of children with special needs, (handicapped), 2 years less than the minimum age for school entrance set by the local school board, or

(iii) 3 years less than the minimum age for school entrance set by the local school board for children who are legally blind, clinically deaf, dependant, or multiple handicapped, or severely behaviorally disordered.

(5) (i) It is the responsibility of the operator to obtain the local school board grade 1 entrance policy in order to establish children who are eligible for funding in ECS programs.

(ii) Children who qualify for entrance to Grade 1, are not eligible for ECS funding, even though they may be attending an ECS program. Arrangements should be made with the local school board for funding of these children.

(iii) Operators shall retain for review or submission, as requested by their Regional Office of Education, documentation to substantiate claims made for Special needs (handicapped) children.

Alberta
EDUCATION

FORM: ECS-3
FORWARD ONE COPY FOR EACH ECS SCHOOL

NAME OF ECS SCHOOL

EARLY CHILDHOOD SERVICES PROGRAM

CLAIM FOR REGULAR TRANSPORTATION GRANT

FOR THE PERIOD _____ 19 ___ TO _____ 19 ___ See Item 3 on Reverse

REFER TO INSTRUCTIONS ON REVERSE:

(1) Child's First or Last Name (See Instructions)	(2) Age as at Sept. 1 or Birthdate	(3) Transported By		(4) Transported		(5) Actual No. of Days Transported In Above Period*	(6) Regulation Rate (See Reverse Side)	(7) Actual Cost Per Child Per Day	(8) Claim Lesser of (5 X 6) or (5 X 7)
		Bus Taxi Etc.	Parent	One Way	Return				
							$	$	$

1. CONDITIONS OF GRANT

(a) This grant may be claimed only if you have paid for transporting a child to or from the child's residence to an E.C.S. program once per day.

Transportation costs incurred for field trips or other activities are not eligible to be claimed.

(b) To be eligible for this grant, transportation must be completed by:

(1) A vehicle registered as a school bus pursuant to regulations under the Public Services Vehicles Act and/or

(2) by the child's parent by way of contract with the operator of an E.C.S. program.

(c) Children residing within the boundaries of a city school district (except in the case of a city school district included in a school division) are not eligible for this grant unless prior approval is obtained from the Department.

2. INSTRUCTIONS

(a) Column 1: Child's first or last name

We do not require this column to be completed. However, you may record the child's name if it is of benefit to you.

(b) (i) Columns 2 to 8 inclusive must be completed, as this information is used to determine your grant levels.

(ii) Column 2: Age or Birthdate

Some operators prefer to use age, eg. 4 years 8 months, whereas others prefer to use birthdates of the children being claimed. You may use whichever method is best suited to your needs.

(iii) Column 5:

Claim only the days that the child was actually transported and for which you incurred an expense.

Do not claim for children who walk to school or for children who are transported but for which the operator has no liability.

(iv) Column 6:

Please refer to Alberta Education Grants Order for rates.

(v) Column 7:

Please indicate the amount it is costing you to transport each child per day.

3. GENERAL

All claims on this grant shall be for the periods ending December 31, March 31, and at the end of your program.

NOTE: Our fiscal year ends on March 31.

Claims for the period ending March 31 must reach our office by April 16 to ensure payment as we are unable to carry over funds from one fiscal year to another.

TO: Alberta Education
Grants Administration
Devonian Building, West Tower
11160 - Jasper Avenue
EDMONTON, Alberta T5K 0L2

Telephone: 427 - 2055

Alberta
EDUCATION

FORM: ECS-4
FORWARD ONE COPY FOR EACH ECS SCHOOL

NAME OF ECS SCHOOL _____

EARLY CHILDHOOD SERVICES PROGRAM

CLAIM FOR TRANSPORTATION FOR HANDICAPPED CHILDREN WHO REQUIRE SPECIAL TRANSPORTATION

For The Period _____ 19 ___ to _____ 19 ___ (See Item 6 on Reverse)

(a)	(b) METHOD OF TRANSPORTATION		(c) CHECK (X)		(d)	(e)	(f)	(g)
CHILD'S NAME	SPECIAL BUS TAXI ETC	PARENT	ONE WAY	RETURN TRIP	ACTUAL NO. OF DAYS TRANSPORTED IN ABOVE PERIOD *	REGULATION RATE (SEE REVERSE SIDE)	OPERATOR'S ACTUAL COST PER CHILD PER DAY	AMOUNT CLAIMED LESSER OF (d x e) (d x f)
						$	$	$

TOTAL CLAIM	$
LESS: ADVANCES RECEIVED FOR THIS PERIOD	$
AMOUNT DUE (OVERPAID)	$

*Please provide information if the actual number of days transported exceeds the maximum number of days possible in the period being claimed.

I/WE THE UNDERSIGNED HEREBY CERTIFY THAT TO THE BEST OF MY/OUR KNOWLEDGE, THE INFORMATION CONTAINED HEREIN IS CORRECT.

DATE: _____

_____
Div., County, District , RCSSD, etc.

_____
Signature: Secretary-Treasurer

_____
Legal Name of Society or Private School

_____
Signature: Presiding Officer or Co-ordinator

_____
Signature: Secretary-Treasurer

INSTRUCTIONS:

(1) To be eligible for ECS Transportation grants, transportation must be completed by:

(a) a vehicle registered as a school bus, pursuant to regulations under the Public Services Vehicle Act and/or
(b) the child's parent by way of a contract with the operator of an ECS Program.

(2) This grant may be claimed for transportation costs incurred for transporting children to and/or from school once per day. Transportation costs incurred for field trips or other activities are not recovered through grants.

(3) Your claim shall be for only those days a child was actually transported and for which you incurred an expense.

(4) Claim only those handicapped children that were approved by the Director of ECS.

(5) Please refer to Alberta Education Grants Order for rates.

(6) All claims on this grant shall be for the periods ending December 31, March 31, and at the end of your program.

NOTE: Our Fiscal Year ends on March 31.

Claims for the period ending March 31 must reach our office by April 16 to ensure payment as we are unable to carry over funds from one fiscal year to another.

TO: Alberta Education
Grants Administration
Devonian Building, West Tower
11160 - Jasper Avenue
EDMONTON, Alberta T5K 0L2

Telephone: 427 - 2055

Alberta

EDUCATION

FORM: ECS 5
Forward One Copy for Each In-Home Program

EARLY CHILDHOOD SERVICES PROGRAM

In-Home Program Transportation Claim

For The Period _____ 19 ___ to _____ 19 ___ (See Item 4 on Reverse)

(a) For Departmental use	(b) NAME OF CHILD VISITED	(c) Age As At Sept 1 or Birthdate	(d) Actual No. of Scheduled Visits in Above Period	(e) Allowable Rate per Scheduled Visit per Child (see reverse)	(f) Operator's Actual Cost per Scheduled Visit per Child	(g) AMOUNT CLAIMED Lesser of (d x e) or (d x f)
				$	$	$

TOTAL CLAIM $ _____

LESS: ADVANCES RECEIVED FOR THIS PERIOD $ _____

AMOUNT DUE (OVERPAID) $ _____

PLEASE PRINT

Person(s) Performing the Above Visits

NAME: _____ OCCUPATION: _____

NAME: _____ OCCUPATION: _____

I/WE HEREBY CERTIFY THAT THE INFORMATION CONTAINED HEREIN IS TRUE AND CORRECT:

SCHOOL BOARD OPERATORS

_____
Signature of Secretary-Treasurer

_____
Div., County, Dist., RCSSD, etc.

PRIVATE OPERATORS

_____
Legal Name of Society or Private School

_____
Signature of Presiding Officer or Co-ordinator

_____
Signature of Secretary-Treasurer

INSTRUCTIONS:

(1) This grant may be claimed for each scheduled visit made by a teacher or teacher aide to the home of a child enrolled in an approved ECS In-Home program.

(2) Claim only those children visited, and the actual number of scheduled visits performed during the period claimed.

(3) Do not claim children visited, who are Indians in respect to whom payment is received from the Government of Canada.

(4) All claims on this grant shall be for the periods ending December 31, March 31, and at the end of your program.

NOTE: Our Fiscal Year ends on March 31.

Claims for the period ending March 31 must reach our office by April 16 to ensure payment as we are unable to carry over funds from one fiscal year to another.

(5) A maximum of 18 visits per child for children in regular programs and 36 visits per child for children in approved ECS Program Units may be claimed. Please refer to Alberta Education Grants Order for rates.

TO: Alberta Education
Grants Administration
Devonian Building, West Tower
11160 Jasper Avenue
EDMONTON, Alberta T5K 0L2

Telephone: 427 - 2055

MONITORING

DEFINITON

Monitoring as a part of the delivery phase, is a continuous process which occurs throughout the school year and will involve all levels of the education system. Monitoring has been defined as:

> A continual process of determining whether implementation is proceeding according to plan. It involves information-gathering and reporting which support day-to-day management and also provides data for subsequent evaluation(s).

ALBERTA EDUCATION MONITORING

Alberta Education will monitor local program delivery throughout the province. An example of provincial monitoring of Program Delivery would be the collection of trend data indicating the average annual sum of provincial grants expended on Vocational Education students throughout the province.

Another example could be the collection of trend data charting the number of students enrolled in the official language programs offered throughout the province.

Such data can be used in a variety of ways. For example, are expenditures rising? If so, by how much and should the reasons for the rising costs be explored more fully, or is an evaluation required?

SCHOOL JURISDICTION MONITORING

School jurisdictions will also monitor program delivery but only within the jurisdiction, not throughout the province. Monitoring of Program Delivery at the local level could involve monitoring the collection of trend data on local transportation costs.

Another example could be the collection of parent and student opinion data concerning the type of educational services provided.

This data could be utilized at the local level in the same way it would be utilized at the provincial level. Are expenditures rising? If so, how much and should the reasons for the rising costs be explored more fully and is an evaluation required?

PHASE THREE: THE MANAGEMENT OF RESULTS

- EVALUATION POLICIES, GUIDELINES AND PROCEDURES
  Introduction
  Student Evaluation
  System Evaluation
  Evaluation Procedures

- THE DRAFT SCHOOL JURISDICTION ANNUAL REPORT
  Introduction
  Draft School Jurisdiction Annual Report
  Draft Annual Report for Privately Operated Early Childhood Services Programs

- ADJUSTMENTS

1984 05 31

PHASE THREE: THE MANAGEMENT OF RESULTS

INTRODUCTION

The third phase of the management process includes use of the following management tools:

- the continuous evaluation of the programs delivered at the local level
- the School Jurisdiction Annual Report which provides program reporting on an annual basis
- the Audited Financial Statement which provides financial reporting on an annual basis. This form is the same form as utilized in the past and a copy has not been included in the information package.
- Continuous adjustments throughout the entire management process.

INTRODUCTION: MANAGEMENT OF RESULTS PHASE EVALUATION

Alberta Education and school jurisdictions have been discussing for some time the need to increase and improve local and provincial use of evaluation in the management of education. A series of draft statements about evaluation was submitted to school jurisdictions and the other members of the educational community for discussion.

Evaluation which is done on a regular basis is an important part of the management of education. To achieve the Government's goal, five statements of evaluation policies, guidelines and procedures have been developed and adopted affecting the following areas:

- Student Evaluation;
- Teacher Evaluation;
- Program Evaluation;
- School Evaluation;
- School System Evaluation.

These policies apply to school jurisdictions, private schools and privately operated Early Childhood Services centres. They will be complemented by the development and implementation of policies, guidelines and procedures at the school jurisdiction level.

The implementation of the five evaluation policies by school jurisdictions, in cooperation with the province, each having well defined areas of responsibility, will assist in ensuring that quality in our education system is maintained and enhanced when necessary.

The Student Evaluation Policy and the System Evaluation Policy have been included as sample evaluation policies. The entire evaluation package is available as an additional document but is not included in the Information Package.

STUDENT EVALUATION

POLICY

Student achievement in provincially-prescribed programs will be evaluated to assist in the establishment, maintenance and advancement of standards.

GUIDELINES

1. The primary responsibility for the continuing evaluation of student achievement lies with each school jurisdiction and its teachers.

2. Each school jurisdiction will develop and adopt written student evaluation policies, guidelines and procedures in keeping with the intent of provincial policies, guidelines and procedures. These policies, guidelines and procedures will be a matter of public record, upon request. Alberta Education will provide assistance in the development of such policies, guidelines and procedures.

3. Student evaluation policies, guidelines and procedures should give consideration to:

   (a) the role of the student and the teacher in evaluations;
   (b) the fairness of the student evaluations;
   (c) the student's right of appeal; and
   (d) the use of the results.

4. Alberta Education has responsibility for assisting in the establishment and maintenance of high standards of educational achievement at the provincial and local level. Therefore, Alberta Education will:

   (a) develop, and provide to school authorities, diagnostic testing instruments to assist in identifying the strengths and weaknesses of students in order that appropriate individual instruction may be provided.
   (b) administer the Achievement Testing Program to establish, maintain and advance standards and to monitor their achievement over time; and
   (c) administer Provincial Diploma Examinations based on an established provincial program of studies at the Grade 12 level;
   (d) certify the academic achievement of graduating students by awarding a General Diploma or an Advanced Diploma;

5. A student's final mark on courses in which there is a Diploma Examination will consist of a 50/50 weighting of a school-awarded mark and the diploma examination mark. The pass mark for all Grade 12 courses will be 50%.

6. A person who is 19 years or older and who is deficient in the credits needed for a High School Diploma may receive a High School Equivalency Diploma from Alberta Education in one of two ways:

   (a) through a combination of formal studies and experience; or
   (b) by passing the General Educational Development tests.

1984 05 31

SCHOOL SYSTEM EVALUATION

POLICY

The school systems of Alberta will be evaluated to assist school authorities in the management and operation of their physical, human and economic resources for the optimal benefit of students within their jurisdictions.

GUIDELINES

1. School jurisdictions have the primary responsibility for the evaluation of school systems.

2. Alberta Education may conduct evaluations of school jurisdictions or of components of their operations upon the request of school jurisdictions. The terms of reference for such evaluations will be established jointly by Alberta Education and school jurisdictions. A final report of the school system evaluation will be made public within 60 days after being tabled with school boards.

3. School system evaluations undertaken by Alberta Education will be conducted by evaluation teams composed of Alberta Education personnel, school system personnel, invited school system personnel from other jurisdictions, and representatives from other education groups.

4. School jurisdictions will develop written policies, guidelines and procedures in keeping with the intent of provincial policies and guidelines. These policies, guidelines and procedures will be a matter of public record, upon request. Alberta Education will assist in the development of policies, guidelines and procedures.

5. School jurisdictions will conduct school system evaluations in order to assess:

   (a) the appropriateness of objectives;
   (b) the achievement of system objectives; and
   (c) the efficiency of the system in achieving objectives.

6. School system evaluations will be used to make decisions with respect to:

   (a) the maintenance, modification or discontinuation of present fiscal, management and program objectives of the system; and
   (b) ways in which the objectives of the fiscal, management and program components can be attained in a more efficient manner.

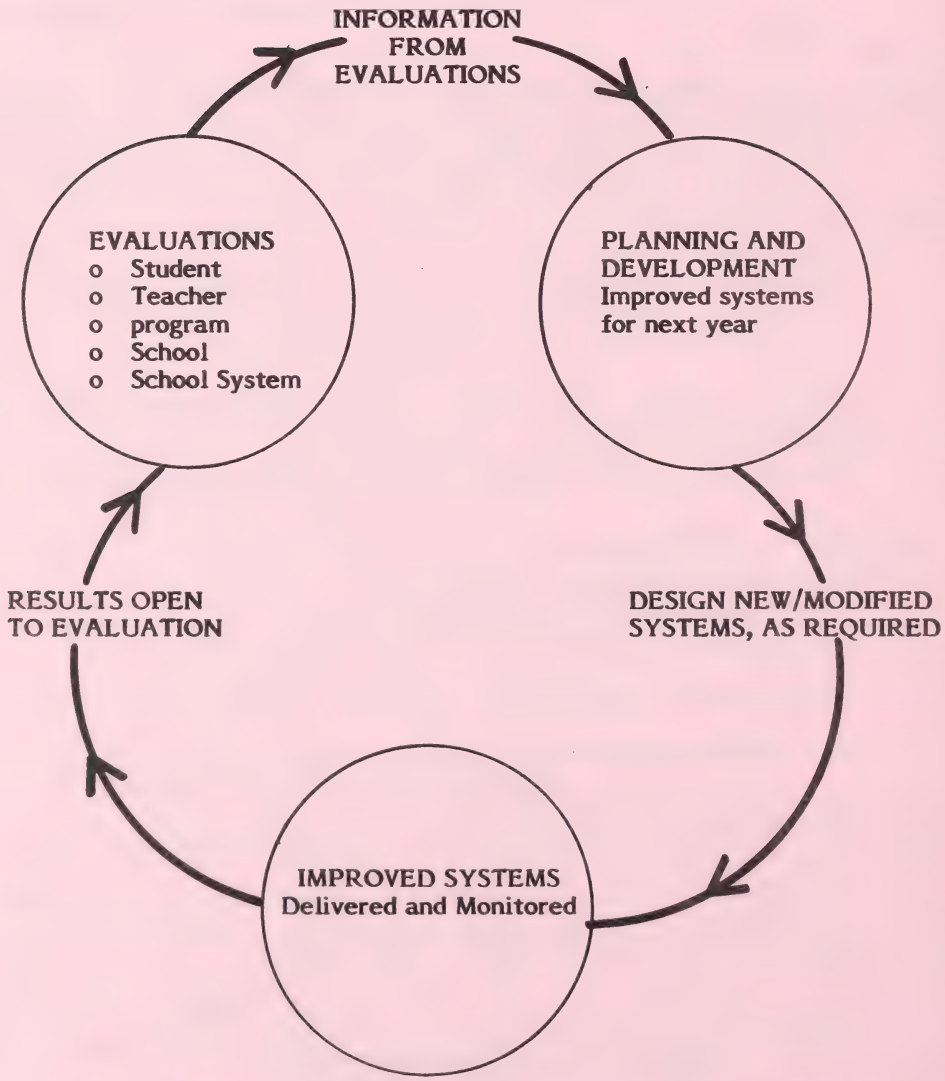
7. Priorities for evaluations should be established which focus on major issues, the resolutions of which are likely to contribute to specific improvements in the management and operation of the school system.

8. Alberta Education will conduct school system evaluations when it is deemed by the Minister to be desirable and in the best public interest to do so. The reports will be released at the discretion of the Minister.

84 05 31

SUMMARY

The following illustrates how evaluation results are used to assist in improving the quality of education delivered to students.



1984 05 31

THE SCHOOL JURISDICTION ANNUAL REPORT

The School Jurisdiction Annual Report is a public document which provides for accountability regarding the programs delivered and the results achieved at the local level. The results achieved will be assessed in relation to the intended results outlined in the Local Educational Plan. Both quantitative and qualitative information will be included in the report. The first report is due July 31, 1985.

Since privately operated Early Childhood Services Programs (ECS) will not be included in the annual report, a separate report has been drafted for private ECS operations and attached to the main report. Draft copies of both the School Jurisdiction Annual Report and the Annual Report for Privately Operated ECS Programs follow on the next page. As mentioned earlier in regard to the Grant Application Form the present School Jurisdiction Annual Report is a draft document which is being revised as required.

ALBERTA EDUCATION

ANNUAL REPORT FORM

FOR SPECIAL NEED PROGRAMS *

REPORTING PERIOD: 1984-1985 PROGRAM YEAR

_____ NO. _____
(Name of School Jurisdiction)

CONDITIONS - SPECIAL NEEDS PROGRAM

1. Local policies and guidelines were compatible with provincial policies and guidelines.

2. Results expected (objectives) were established for each program prior to implementation.

3. The programs were locally monitored and evaluated as planned by the local jurisdiction.

4. Local educational plans and pertinent monitoring and evaluation documents were accessible to the public.

We, the undersigned, hereby affirm that the jurisdictional educational programs described herein have been conducted in accordance with the above conditions and the information herein to the best of our knowledge is true and correct.

SIGNED _____ DATED _____
(Superintendent of Schools)

SIGNED _____ DATED _____
(Secretary-Treasurer)

NOTE: It is required that two completed copies of the report be forwarded to your local Regional Office, Alberta Education, on or before July 31, 1985.

* SPECIAL NEED PROGRAMS

1. ACADEMIC-OCCUPATIONAL PROGRAMS
2. EDUCATIONAL OPPORTUNITY FUND - COMPENSATORY PROGRAMS
3. EDUCATIONAL OPPORTUNITY FUND - ELEMENTARY PROGRAMS
4. EXTENSION PROGRAMS
5. GIFTED CHILDREN PROGRAMS
6. OFFICIAL AND OTHER LANGUAGE PROGRAMS
7. SPECIAL EDUCATION PROGRAMS
8. TEACHER IN-SERVICE PROGRAMS
9. VOCATIONAL EDUCATION PROGRAMS
10. EARLY CHILDHOOD SERVICES OPERATED BY THE SCHOOL JURISDICTION
(NOTE: INFORMATION ON PRIVATELY OPERATED E.C.S. PROGRAMS WILL BE GATHERED SEPARATELY.)

ANNUAL PROGRAM REPORT: _____
(Name of School Jurisdiction)

I. SPECIAL NEED PROGRAM **ACADEMIC OCCUPATION**

II. GENERAL DESCRIPTION OF PROGRAM(S) AND MAJOR ACTIVITIES UNDERTAKEN

PROGRAM OBJECTIVES

_____

_____

_____

_____

_____

PROGRAM ACTIVITIES AND RESULTS ACHIEVED (ADD ADDITIONAL INFORMATION IF NECESSARY)

ACTIVITIES (PLEASE NUMBER)	RESULTS

NUMBER OF SCHOOLS INVOLVED _____
NUMBER OF PROGRAMS OFFERED _____

NUMBER OF STUDENTS	YEAR 1	YEAR 2	YEAR 3

CLASSES

PROGRAM OBJECTIVES FOR NEXT SCHOOL YEAR. (Based on results achieved this school year indicate program areas to be emphasized in the coming year, i.e., community involvement, equipment and resources, facilities, monitoring and evaluating, professional development etc.)

ANNUAL PROGRAM REPORT: _____
(Name of School Jurisdiction)

I. SPECIAL NEED PROGRAM **EDUCATIONAL OPPORTUNITY FUND-COMPENSATORY PROGRAM**

II. GENERAL DESCRIPTION OF PROGRAM(S) AND MAJOR ACTIVITIES UNDERTAKEN

PROGRAM OBJECTIVES

_____

_____

_____

_____

_____

PROGRAM ACTIVITIES AND RESULTS ACHIEVED (ADD ADDITIONAL INFORMATION IF NECESSARY)

ACTIVITIES (PLEASE NUMBER)	RESULTS

NUMBER OF SCHOOLS INVOLVED _____
NUMBER OF PROJECTS _____

NAME OF PROJECT	No. of Students	Grade(s) Involved
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

PROGRAM OBJECTIVES FOR NEXT SCHOOL YEAR. (Based on results achieved this school year indicate program areas to be emphasized in the coming year, i.e., community involvement, equipment and resources, facilities, monitoring and evaluating, professional development etc.)

ANNUAL PROGRAM REPORT: _____
(Name of School Jurisdiction)

I. SPECIAL NEED PROGRAM **EDUCATIONAL OPPORTUNITY FUND-ELEMENTARY PROGRAMS**

II. GENERAL DESCRIPTION OF PROGRAM(S) AND MAJOR ACTIVITIES UNDERTAKEN

PROGRAM OBJECTIVES

_____

_____

_____

_____

_____

PROGRAM ACTIVITIES AND RESULTS ACHIEVED (ADD ADDITIONAL INFORMATION IF NECESSARY)

ACTIVITIES (PLEASE NUMBER)	RESULTS

NUMBER OF SCHOOLS INVOLVED _____
NUMBER OF PROJECTS _____

NAME OF PROJECT	No. of Students	Grade(s) Involved
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

PROGRAM OBJECTIVES FOR NEXT SCHOOL YEAR. (Based on results achieved this school year indicate program areas to be emphasized in the coming year, i.e., community involvement, equipment and resources, facilities, monitoring and evaluating, professional development etc.)

ANNUAL PROGRAM REPORT: _____
(Name of School Jurisdiction)

I. SPECIAL NEED PROGRAM **EXTENSION PROGRAMS**
(Eligible for Alberta Education Funding)

II. GENERAL DESCRIPTION OF PROGRAM(S) AND MAJOR ACTIVITIES UNDERTAKEN

PROGRAM OBJECTIVES

_____

_____

_____

_____

_____

PROGRAM ACTIVITIES AND RESULTS ACHIEVED (ADD ADDITIONAL INFORMATION IF NECESSARY)

ACTIVITIES (PLEASE NUMBER)	RESULTS

NUMBER OF SCHOOLS INVOLVED _____
NUMBER OF PROGRAMS OFFERED _____
Please attach a list of programs offered)
NUMBER OF STUDENTS ENROLLED _____

PROGRAM OBJECTIVES FOR NEXT SCHOOL YEAR. (Based on results achieved this school year indicate program areas to be emphasized in the coming year, i.e., community involvement, equipment and resources, facilities, monitoring and evaluating, professional development etc.)

ANNUAL PROGRAM REPORT: _____
(Name of School Jurisdiction)

I. SPECIAL NEED PROGRAM **GIFTED CHILDREN PROGRAM(S)**

II. GENERAL DESCRIPTION OF PROGRAM(S) AND MAJOR ACTIVITIES UNDERTAKEN

PROGRAM OBJECTIVES

PROGRAM ACTIVITIES AND RESULTS ACHIEVED (ADD ADDITIONAL INFORMATION IF NECESSARY)

ACTIVITIES (PLEASE NUMBER)	RESULTS

TYPE OF PROGRAM	ENROLMENT	AGE OF STUDENTS

PROGRAM OBJECTIVES FOR NEXT SCHOOL YEAR. (Based on results achieved this school year indicate program areas to be emphasized in the coming year, i.e., community involvement, equipment and resources, facilities, monitoring and evaluating, professional development etc.)

ANNUAL PROGRAM REPORT: _____
(Name of School Jurisdiction)

I. SPECIAL NEED PROGRAM **OFFICIAL AND OTHER LANGUAGE PROGRAMS**

II. GENERAL DESCRIPTION OF PROGRAM(S) AND MAJOR ACTIVITIES UNDERTAKEN

PROGRAM OBJECTIVES

PROGRAM ACTIVITIES AND RESULTS ACHIEVED (ADD ADDITIONAL INFORMATION IF NECESSARY)

ACTIVITIES (PLEASE NUMBER)	RESULTS

Type of Program	✓	Name of School Involved	Enrolment	Grade(s) Involved
French Language Programs a) according to Section 159 (1)(a) of School Act				
b) second language				
Languages Other than English or French a) according to Section 159 (1)(b) of School Act - specify language				
b) second language - specify language				
English as a Second Language				

PROGRAM OBJECTIVES FOR NEXT SCHOOL YEAR. (Based on results achieved this school year indicate program areas to be emphasized in the coming year, i.e., community involvement, equipment and resources, facilities, monitoring and evaluating, professional development etc.)

ANNUAL PROGRAM REPORT: _____
(Name of School Jurisdiction)

I. SPECIAL NEED PROGRAM **SPECIAL EDUCATION PROGRAMS**

II. GENERAL DESCRIPTION OF PROGRAM(S) AND MAJOR ACTIVITIES UNDERTAKEN

PROGRAM OBJECTIVES

PROGRAM ACTIVITIES AND RESULTS ACHIEVED (ADD ADDITIONAL INFORMATION IF NECESSARY)

ACTIVITIES (PLEASE NUMBER)	RESULTS

TYPE OF PROGRAM	ENROLMENT	AGE OF STUDENTS INVOLVED

PROGRAM OBJECTIVES FOR NEXT SCHOOL YEAR. (Based on results achieved this school year indicate program areas to be emphasized in the coming year, i.e., community involvement, equipment and resources, facilities, monitoring and evaluating, professional development etc.)

ANNUAL PROGRAM REPORT: _____
(Name of School Jurisdiction)

I. SPECIAL NEED PROGRAM **TEACHER IN-SERVICE PROGRAMS**

II. GENERAL DESCRIPTION OF PROGRAM(S) AND MAJOR ACTIVITIES UNDERTAKEN

PROGRAM OBJECTIVES

PROGRAM ACTIVITIES AND RESULTS ACHIEVED (ADD ADDITIONAL INFORMATION IF NECESSARY)

ACTIVITIES (PLEASE NUMBER)	RESULTS

PROGRAM TITLE	NO. PARTICIPATING

PROGRAM OBJECTIVES FOR NEXT SCHOOL YEAR. (Based on results achieved this school year indicate program areas to be emphasized in the coming year, i.e., community involvement, equipment and resources, facilities, monitoring and evaluating, professional development etc.)

ANNUAL PROGRAM REPORT: _____
(Name of School Jurisdiction)

I. SPECIAL NEED PROGRAM **VOCATIONAL EDUCATION**

II. GENERAL DESCRIPTION OF PROGRAM(S) AND MAJOR ACTIVITIES UNDERTAKEN

PROGRAM OBJECTIVES

_____

_____

_____

_____

_____

PROGRAM ACTIVITIES AND RESULTS ACHIEVED (ADD ADDITIONAL INFORMATION IF NECESSARY)

ACTIVITIES (PLEASE NUMBER)	RESULTS

TOTAL NO. OF SCHOOLS INVOLVED _____

COURSE OFFERED	ENROLMENT

PROGRAM OBJECTIVES FOR NEXT SCHOOL YEAR. (Based on results achieved this school year indicate program areas to be emphasized in the coming year, i.e., community involvement, equipment and resources, facilities, monitoring and evaluating, professional development etc.)

ANNUAL PROGRAM REPORT: _____
(Name of School Jurisdiction)

I. SPECIAL NEED PROGRAM **EARLY CHILDHOOD SERVICES OPERATED BY THE LOCAL SCHOOL JURISDICTION**

II. GENERAL DESCRIPTION OF PROGRAM(S) AND MAJOR ACTIVITIES UNDERTAKEN

PROGRAM OBJECTIVES

_____

_____

_____

_____

_____

PROGRAM ACTIVITIES AND RESULTS ACHIEVED (ADD ADDITIONAL INFORMATION IF NECESSARY) - PLEASE SEPARATE ACTIVITIES ACCORDING TO TYPE A, B, AND C STUDENTS

ACTIVITIES (PLEASE NUMBER)	RESULTS

ON A SEPARATE SHEET INDICATE (1) OFFICIAL AND SECOND LANGUAGE PROGRAM ACTIVITIES AND RESULTS AND (2) RESULTS OF PARENT PROGRAMMING AND REGIONAL CO-ORDINATION AND (3) IN-SERVICE ACTIVITIES.

TYPE A = SPECIAL EDUCATION STUDENTS - INDICATE DEGREE OF DISABILITY
TYPE B = DESIGNATED DISADVANTAGED
TYPE C = GENERAL STUDENTS

SCHOOL OR CENTRE	ENROLMENT		
	TYPE A	TYPE B	TYPE C
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

PROGRAM OBJECTIVES FOR NEXT SCHOOL YEAR. (Based on results achieved this school year indicate program areas to be emphasized in the coming year, i.e., community involvement, equipment and resources, facilities, monitoring and evaluating, professional development etc.)

ALBERTA EDUCATION
ANNUAL REPORT FORM
SUMMARY INFORMATION

REPORTING PERIOD: 1984-1985 PROGRAM YEAR

THE INTENT OF THIS SECTION OF THE REPORT IS TO PROVIDE INFORMATION ON SPECIAL NEEDS AREA PROGRAMS ADDED, DELETED AND PROPOSED.

SPECIAL NEEDS AREA PROGRAMS ADDED DURING THE 1984-85 SCHOOL YEAR

_____
_____
_____
_____

SPECIAL NEEDS AREA PROGRAMS TO BE DELETED AT THE CONCLUSION OF THE 1984-85 SCHOOL YEAR

_____
_____
_____
_____

SPECIAL NEEDS AREA PROGRAM PROPOSED FOR THE COMING PROGRAM YEAR

_____
_____
_____
_____

WILL THESE PROGRAMS REPLACE OR SUPPLEMENT EXISTING PROGRAMS?

_____

_____

_____

WHAT MATERIAL AND HUMAN RESOURCES WILL BE REQUIRED TO OPERATE THE PROPOSED PROGRAMS?

_____

_____

_____

EXHIBIT 1
SPECIAL NEEDS PROGRAMS

Details of Revenues

	Alberta Education	Alberta School Authorities	Other	TOTALS
1. & 9. VOCATIONAL EDUCATION				
Academic Occupational				
Vocational Education				
2. & 3. EDUCATIONAL OPPORTUNITY FUND				
Compensatory				
Elementary				
4. EXTENSION				
5. GIFTED CHILDREN				
6. OFFICIAL AND OTHER LANGUAGES				
7. SPECIAL EDUCATION				
8. TEACHER IN-SERVICE				
10. E.C.S. (Operated By Board)				
TOTALS		*		

* To Agree With Schedule 1

EXHIBIT 2
SPECIAL NEEDS PROGRAMS

Details of Expenditures

	200 Salaries	300 Employee Benefits and Allowances	400 Services Purchased and Contracted	600 Supplies and Materials	700 Contributions to Capital	900 Transfers	TOTALS
1. & 9. **VOCATIONAL EDUCATION**							
Academic Occupational							
Vocational Education							
2. & 3. **EDUCATIONAL OPPORTUNITY FUND**							
Compensatory							
Elementary							
4. **EXTENSION**							
5. **GIFTED CHILDREN**							
6. **OFFICIAL AND OTHER LANGUAGES**							
7. **SPECIAL EDUCATION**							
8. **TEACHER IN-SERVICE**							
10. **E.C.S.** (Operated By Board)							
TOTALS						*	

* To Agree With Schedule 2

SCHEDULE I

DETAILS OF REVENUE FROM ALBERTA SCHOOL AUTHORITIES

NAME OF SCHOOL AUTHORITY	No.	TOTALS
1.		$
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
TOTALS		

* To Agree With Exhibit 1

SCHEDULE 2

EXPENDITURE (TRANSFERS)

1. TO ALBERTA SCHOOL DISTRICTS, DIVISIONS AND COUNTIES

NAME OF SCHOOL AUTHORITY	No.	TOTALS
1.		$
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
T O T A L S		

2. TO OTHER GOVERNMENT AUTHORITES _____

3. TO ORGANIZATIONS AND INDIVIDUALS _____ *

T O T A L S _____

* To Agree With Exhibit 2

ALBERTA EDUCATION

ANNUAL REPORT FORM

FOR PRIVATELY OPERATED EARLY CHILDHOOD SERVICES PROGRAMS

REPORTING PERIOD: 1984–1985 PROGRAM YEAR

_____ NO. _____
(Name of Private E.C.S. Operator - Incorporated, Non-Profit Society)

CONDITIONS - SPECIAL NEEDS PROGRAM

1. Local policies and guidelines were compatible with provincial policies and guidelines.
2. Results expected (objectives) were established for each program prior to implementation.
3. The programs were locally monitored and evaluated as planned.
4. Local educational plans and pertinent monitoring and evaluation documents were accessible to the public.

We, the undersigned, hereby affirm that the E.C.S. educational program(s) described herein have been conducted in accordance with the above conditions and the information herein to the best of our knowledge is true and correct.

SIGNED _____ DATED _____
(President of the Incorporated Non-Profit Society or Designated Officer)

SIGNED _____ DATED _____
(Treasurer)

NOTE: It is required that two completed copies of the report be forwarded to your local Regional Office, Alberta Education, on or before July 31, 1985.

ANNUAL PROGRAM REPORT: _____
(Name of School Jurisdiction)

I. SPECIAL NEED PROGRAM **EARLY CHILDHOOD SERVICES PRIVATELY OPERATED**

II. GENERAL DESCRIPTION OF PROGRAM(S) AND MAJOR ACTIVITIES UNDERTAKEN

PROGRAM DESCRIPTION (OBJECTIVES)

_____

_____

_____

_____

MAJOR ACTIVITES AND RESULTS ACHIEVED (ADD ADDITIONAL INFORMATION IF NECESSARY)

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

SCHOOL	ENROLMENT
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

PROGRAM OBJECTIVES FOR NEXT SCHOOL YEAR. (Based on results achieved this school year indicate program areas to be emphasized in the coming year, i.e., community involvement, equipment and resources, facilities, monitoring and evaluating, professional development etc.)

ADJUSTMENTS

Adjustments are the last management tool to be discussed. Monitoring and evaluation adjustments are continuous in nature and may occur throughout the entire Management and Finance process. Adjustments may be recommended, their implementation ensured, or implemented by Alberta Education and the local jurisdictions. Adjustments are:

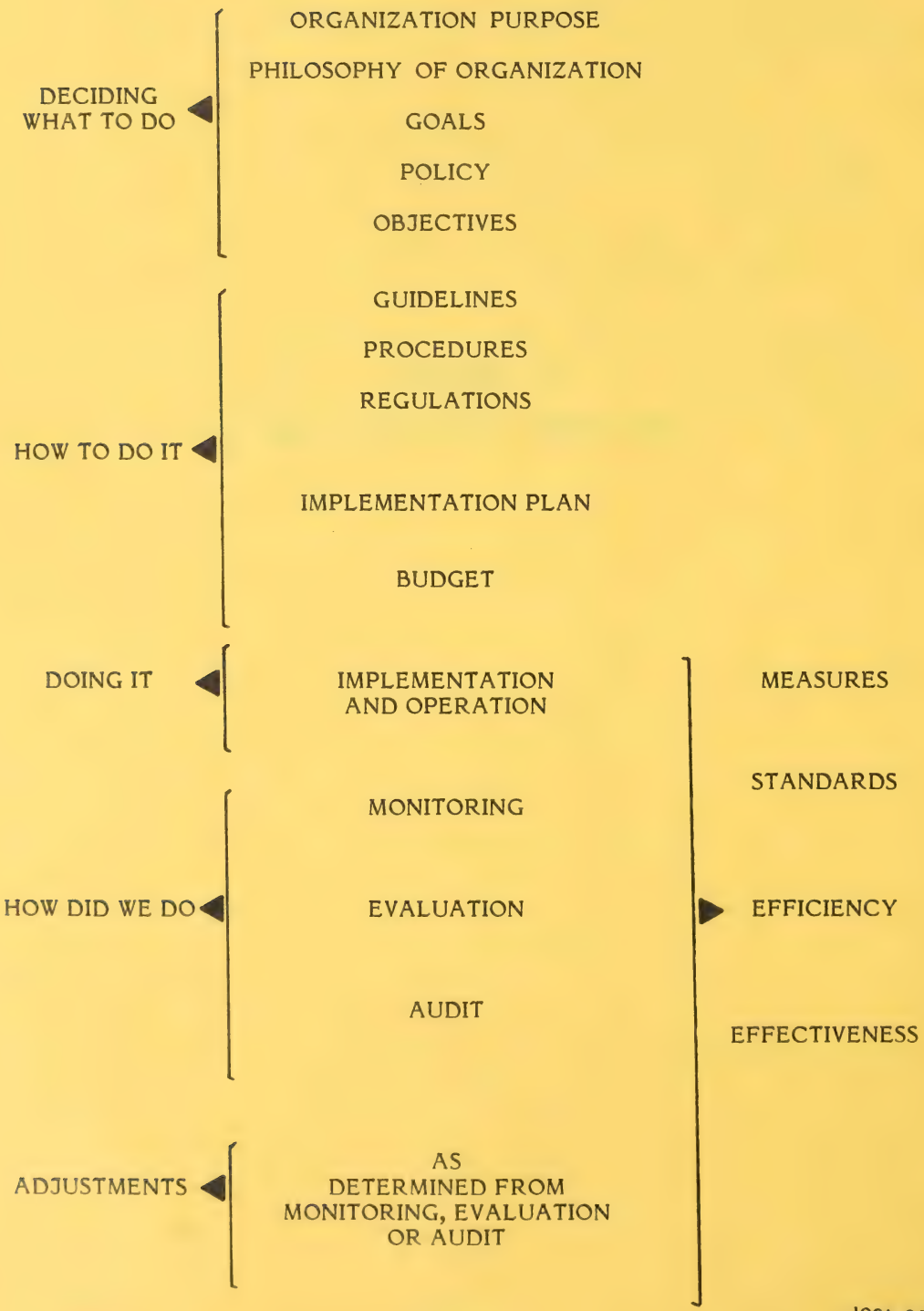
> Actions implemented by Alberta Education or local jurisdictions to insure compliance with plans or the penalties for non-compliance with plans. Monitoring and, to a greater degree, the evaluation and audit functions may result in adjustments to the activities of school jurisdictions.
>
> In addition, the process may result in feedback which suggests change to the activities employed by Alberta Education.

For example if upon evaluation of a jurisdiction's Special Education program, it became known that no policy for the Special Education program had been developed or utilized at the local level, Alberta Education and the local school jurisdictions would take steps to ensure that appropriate adjustments were made at the local level.

V. APPENDIX:

DEFINITIONS OF SELECTED TERMS

OVERVIEW OF MANAGEMENT TERMS



1984 05 31

DEFINITIONS

A) DECIDING WHAT TO DO

PURPOSE: (Mission Statement) — The purpose of an organization is the fundamental reason for which the institution exists and establishes the enabling conditions through which the organization will operate. It is usually long term in nature.

PHILOSOPHY: — Philosophy is the statement of principles upon which the purposes of the organization are based.

GOAL: — A goal is a statement which describes a deserved end in general terms over an unspecified period of time.

POLICY: — A policy is a philosophically based statement which is goal-oriented establishing the direction for future discretionary action.

OBJECTIVE: — An objective is a statement of desired specific results to be achieved over a specified period of time. It answers both **"what"** and **"when"**.

B) HOW TO DO IT

GUIDELINE: — A guideline further defines the framework within which the organization can discharge the policy with positive direction. It tells what is wanted. It may also indicate why and how.

PROCEDURE: — A procedure is a statement of who does what, how, and in what sequence. Procedures may be either mandatory or discretionary.

REGULATION: — A regulation is a statement which directs action. Some regulations may be mandatory; that is, specify that action shall take place, while others may be discretionary, that is, suggest what action may occur.

MEASURE: A measure is a description in specific terms of how to assess progress towards achieving an objective.

STANDARD: A standard is a statement of the minimum level or quality of results achieved that are desired/expected/acceptable in the delivery of a program or a service. They establish whether the objective has been successfully achieved.

IMPLEMENTATION PLAN: An implementation plan consists of a series of pre-determined activities required to achieve desired ends.

BUDGET: A budget is a detailed plan for the allocation of the fiscal and human resources required to achieve the goals and objectives of the organization over a definite period of time.

C) DOING IT

IMPLEMENTATION: Implementation is the process of putting a plan into operation.

D) HOW DID WE DO?

MONITORING: Monitoring is a continual process of determining whether implementation is proceeding according to plan. It involves information-gathering and reporting which support day to day management and also provides data for subsequent evaluation(s).

EVALUATION: Evaluation is an in-depth analytical activity designed to provide information about the results, effectiveness and efficiency of the organization and its programs.

While there are many different types of evaluation, two are mentioned here: summative and formative evaluation.

EVALUATION (cont'd)

Summative or outcome evaluation is characteristically concerned with evaluation of results. It involves such a question as: Shall we accept, retain or modify the program? It is summative in that it has an overall decisive function (outcome). It is most useful in determining which programs work and thereby provides a basis for making decisions about alternative programs.

Formative evaluation is an ongoing process in which information is added continuously, organized systematically and analyzed periodically. It supplies information which may contribute to a review of decisions on specific aspects of a program.

FINANCIAL AUDIT:

Financial auditing is primarily concerned with the effectiveness of the flow of accounting information and with the reliability of accounting records.

It is an evaluation of:

(a) compliance to established policies, plans and procedures;
(b) the soundness and adequacy of the system to accomplish its purpose at reasonable cost;
(c) reliability and sufficiency of the financial and management information generated; and
(d) the quality of work performed by personnel with control systems responsibilities.

E) ADJUSTMENTS

ADJUSTMENTS:

Adjustments are actions implemented by Alberta Education in order to ensure compliance with plans or to penalize for non-compliance with plans. Monitoring and, to a greater degree, the evaluation and audit functions may result in adjustments to the activities of school jurisdictions.

In addition, the process may result in feedback which suggests change to the activities employed by Alberta Education.

Adjustments can be viewed as existing on a continuum.

LEAST FORMAL		FORMAL/LEGAL
PERSUASION	ADJUSTMENTS SUGGESTED	ADJUSTMENTS ENFORCED

F) OTHER

EFFICIENCY: Efficiency refers to determining and assessing the relative costs to achieving the objectives set for the activity. With what degree of economy are the objectives achieved? Could alternative programs be designed to achieve the same results at a lower costs? Might some changes be made in the existing program to make it operate more efficiently without additional expenditures? Are the right resources at the right prices being used?

EFFECTIVENESS: Effectiveness is concerned with the achievement of objectives. The identification of objectives and their measurement is of central importance to effectiveness analysis.

PROGRAM: A program consists of interdependent activities and services designed to achieve specific organizational goals, policies and objectives.

RESULTS: Results are the observed state of a situation, an outcome produced by an action or series of actions. The result may be intended or unintended.

N.L.C. - B.N.C.
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